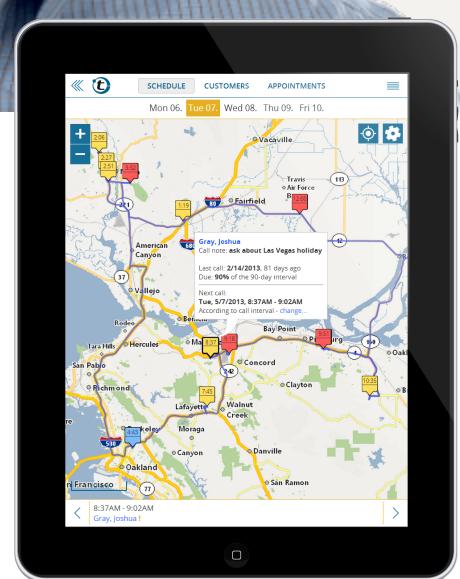


User Manual

portatour® Anywhere

Last updated on 07.08.2013

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www.portatour.com

Welcome to the future of sales-route planning !

Dear Sales Representative,

we are pleased to provide a further means to facilitate your daily work:

From now on your personal expenses for sales-route planning will be reduced considerably and in the future you will spend less time in the car while visiting more customers.

With *portatour®* you have a mobile real-time sales-route planner that will revolutionize your current sales-route planning. *portatour®* is:

- **fast**

portatour® automatically creates a sales-route proposal within seconds. One push of a button is enough to receive an optimized schedule for the next days, including exact times.

- **intelligent**

Besides customer data (address, business hours, call urgency), *portatour®* considers in the sales-route calculation the configured departure- and overnight stay location, appointments in your calendar, and the working time available for client visits.

- **dynamic**

For the first time, you can react to changes in the schedule. Whether you have an urgent appointment or have to cancel a scheduled customer call, *portatour®* adopts the changed requirements and turns them within seconds into a newly optimized schedule.

- **mobile**

portatour® runs on your mobile phone. You will always have key customer information at hand: addresses, street maps, business hours and selected call data.

Before you start

This manual explains step by step how to set up and effectively use *portatour®* in the daily routine of your field sales work. It is particularly important to us that you have more time for customer service by using *portatour®*. Therefore, we would like to give some tips in advance.

You profit from *portatour®* most when the quality of the data used for calculating your sales-route plan is correct. Our recommendation is:

- **Make sure that the data of your customers is complete and current.**
- **Keep your electronic schedule up to date**

You get your well invested time for setting up *portatour®* back every day due to automatic, optimized sales-route scheduling.

Customer Data

You import your customer data, which will be the basis for sales-route planning.

As field sales force you know your customers best and recognize individual support requirements. Therefore, check and update customer data by taking into account following points:

- The more accurate customer addresses are, the more accurate the schedule.
- Use the option to define business hours also when a customer is open throughout but has a time slot reserved for sales rep visits.
- From the call interval set and the last call *portatour®* calculates the call urgency. In only very rare cases it is advisable to visit all customers at the same interval. Therefore, you can see *portatour®* as an opportunity to examine the current customer classification for plausibility or create a new classification with individual call intervals suited for each customer category.
- Enter the estimated call duration for your customers. Review how this influences schedules in everyday life and adjust the values as needed.

Electronic Calendar

In the future, use the *portatour®* calendar for dates outside the call activity, such as:

- Business appointments (meetings in the office, pick up advertising material from the warehouse, ...)
- Errands during the day (doctor visits, ...)
- Longer lasting telephone calls (conference call, ...)
- Meetings after work or a planned overnight stay on the way (hotel, ...)

You will be pleasantly surprised how much driving time the consequent and complete use of your calendar will save you in the future.

We are confident that this User Manual will provide you with a good orientation and enrolment for *portatour*®. If you have further suggestions, please send them to the *portatour*®-Team via feedback@portatour.net.

We wish that *portatour*® does not only simplify your work as daily companion, but also increases your turnover through more effective customer service.

Sincerely

Your *portatour*®-Team, represented by

DI Matthias Grünberger

Managing Director

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1. What is *portatour®* Anywhere?

portatour® is your personal route-planner software, trusted by sales reps, field sales force, consultants, and service team members. *portatour®* schedules calls to A, B, and C-priority customers in the right frequency – while also optimizing the driving route. *portatour®* is available on any device with a web browser: On a Desktop-PC in the (Home-)Office, as well as on the way on a notebook, tablet and smartphone. The data is automatically synchronized.

How does *portatour®* work?

To create an optimized sales-route *portatour®* uses following input:

- Customer data. Each customer is different: business hours, call frequency and the estimated call duration will be considered individually by *portatour®*.

- Appointments entered into the *portatour®* calendar: fixed customer appointments, business appointments, personal errands during the day and important phone calls.

- You decide how to work: When does your working day start? Where do you start? When do you take breaks? How long do you work? Do you consider an overnight stay on the way and where are your favorite hotels?

- Using digital maps at house number detail, which are updated regularly, *portatour®* calculates a distance matrix containing the fastest routes between all customers.



At the push of a button *portatour®* calculates within a few seconds an optimized route for up to 4 weeks in advance, from millions of possible solutions, using an intelligent algorithm. *portatour®* takes care of automatically selecting customers that are to be visited according to call interval, while optimizing the route at the same time. Appointments from your calendar and customers that you definitely want to visit are of highest priority in this selection.

The sales-route plan presents all customers to be visited with exact time slots and the driving route for each day. You may personalize this schedule by excluding proposed calls or adding additional appointments. Let *portatour®* optimize your updated schedule.

Start your tour! After each customer call enter an optional call report at the push of a button.

You know best: No matter how good a tour is planned, unforeseen changes happen during the day: Waiting time on site, contacts that are not present or do not have time, urgent appointments that have to be sandwiched in-between, and last but not least traffic incidents that disrupt original schedules. From now on you react by pushing a button and *portatour*[®] updates your schedule starting from the current time&location for the remaining workday.

1.1 Sales-route planning

In course of the fully automated sales-route planning, *portatour*[®] selects which customers to call while also optimizing the driving route.

portatour[®] selects customer to call based on the following priorities:

- **Fixed appointments in the calendar**

Fixed appointments in your calendar have the highest priority in sales-route planning for *portatour*[®]. They can be customer calls, as well as other activities – e.g. a company meeting or going to a garage. Appointments are scheduled in any case at the appointed time.

- **Customer reservations**

Manually included customers are the second priority for *portatour*[®]. I.e. if you absolutely want to call a customer in the next few days, but have not agreed on a specific date in the calendar, you can "include" him/her for a call. By this it becomes mandatory for *portatour*[®] to include the customer in the planning. The day and time is selected automatically by *portatour*[®] during sales-route optimization.

- **Automatically suggested customers according to call interval**

Your schedule is filled up with clients that are configured for automatic sales-route planning. For customers whom you want to call on a regular basis, *portatour*[®] automatically takes your call interval requirements into account, while placing equal emphasis on optimizing the sales-route.

The general rule is: The less you interfere in sales-route planning by fixing appointments, the more planning scope *portatour*[®] has to optimize sales-routes, and the more flexibility *portatour*[®] has to react to unforeseen events throughout the work day such as traffic jams or prolonged calls.

1.2 Runs in the browser

portatour[®] Anywhere is the web-based version of *portatour*[®] and works on various devices – desktop PC, notebook, tablet and smartphone. This way, for example, you could do your customer data maintenance and sales-route preparation comfortably on your PC in the (home-)office, while retrieving schedule and customer data from your tablet or smartphone on the way, and updating and creating customer call reports, where required. Synchronization between the devices is not necessary.

portatour[®] Anywhere does not have to be installed on the respective device, but is rather accessed directly by entering a web address into the web browser. Therefore, an active internet connection is necessary to use *portatour*[®] Anywhere.

Presentation on different devices

The presentation of content in *portatour*[®] Anywhere is automatically adapted to the screen- or window size of the respective web browser and appears in one-, two-, or three columns. Typically, the following applies:

- One column: Smartphones in portrait format
- Two columns: Smartphones in landscape format, tablets in portrait format
- Three columns: Tablets in landscape format, desktop PCs and notebooks in full screen size.

There may be deviations, depending on device type and size

Screenshots in this manual are generally shown in three column mode. The ones with different display modes are discussed separately.

1.3 System requirements

portatour® Anywhere is programmed in HTML5 and requires a web browser that is sufficiently up-to-date:

- Desktop-Browser, such as **Firefox 17, Chrome 23, Internet Explorer 10**
- Smartphone und Tablets, such as **Android 4, iOS 6, Windows Phone 8**

Please note the following requirements, if you use *portatour®* Anywhere on your mobile phone:

- Internet access via GPRS – better UMTS (3G), HSPA (3G+) or LTE (4G)
- Monthly data plan with 500 MB data volume (or more)

Deactivate internet proxy on mobile phones

If you have purchased your smartphone or tablet directly from the network operator, the proxy server of the network operator might be registered in your internet connection settings, through which your internet data traffic runs. Under certain circumstances, this proxy server is interfering with the use of *portatour®* Anywhere – e.g. error pages from *portatour®* could be replaced by pages of the network operator. We recommend to deactivate the proxy server. Please refer to the manual of your device, if necessary.

2. First Use

2.1 Your Access Link

Either your administrator has created your access for you or you have registered yourself on www.-portatour.com/anywhere/. Upon creation of your account, you will receive an email with your personal portatour® access link.

This access link has following structure:

<https://my.portatour.net/a/ababab42>

2.2 Set password

Open the access link by clicking or manually entering the address in the web browser. portatour® shows following input form:

The screenshot shows a login form titled "WELCOME SUSANNE MUSTERMANN!" with a yellow header bar. The text "You are logging in to portatour® for the first time. Your user name has been generated automatically and is:" is displayed, followed by the placeholder "exice9". Below this, the instruction "Write it down!" is shown. The next section asks "Please choose a password you will use besides the user name to access portatour® on all your devices." It contains two input fields: "Password:" and "Confirm password:", both with placeholder text. Below these fields are two checkboxes: "Remember me" and "Lizenzbedingungen akzeptieren". At the bottom is a blue "LOGIN" button.

Write down your **user name**. You will need this for future access to portatour® on your devices.

Now enter a **Password** of your choice. Upper/lower case will be ignored. The characters entered are hidden.

By activating **Remember me**, the browser remembers your login and you will automatically have access the next time you access portatour® Anywhere.

Read the **License terms** and confirm your agreement by activating the box to the left of the license conditions.

Click **Login**. You will get to the homepage of portatour® Anywhere.

In the next section, you will find how to access portatour® in the future.

2.3 User login in *portatour® Anywhere*

The access link you received on your device via email or SMS leads you to <https://my-portatour.net/a/> and optionally contains your user name at the end. Click this link or enter it into the web browser. You get to the login page. Enter your **User name** and your **Password**. Upper/lower case will be ignored. The characters entered are hidden.

The image shows a login interface with the following elements:

- A title "LOGIN" at the top center.
- A "User:" label followed by a text input field containing "ababab99".
- A "Password:" label followed by a text input field containing "*****".
- A "Remember me" checkbox which is checked.
- A large blue "LOGIN" button at the bottom.
- A link "Forgot your password?" at the bottom right.

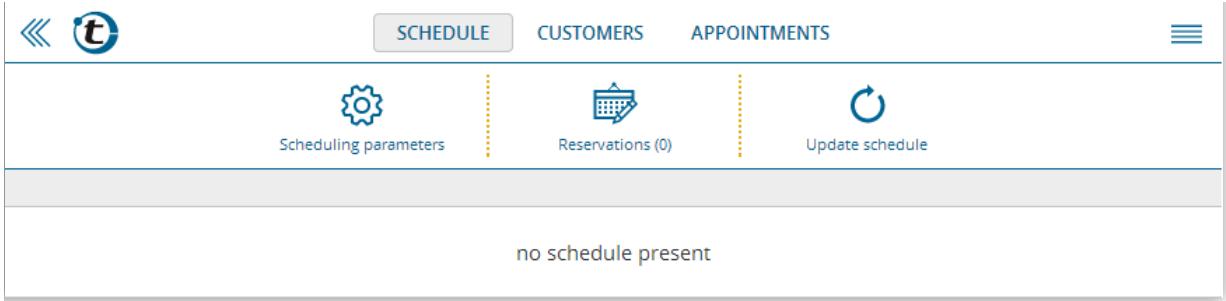
Hint: We recommend to add this page to your favorites (bookmarks) in your web browser or to create an icon on your home screen in order to enable faster access of *portatour® Anywhere* in the future.

If you keep **Remember me** activated, you will automatically be forwarded to the homepage the next time you access *portatour® Anywhere* – until you quit the program with the **Logout** option.

Hint: In this case, think about protecting your mobile device from unauthorized access by configuring a security PIN to unlock your mobile. Change your password in case of loss or theft of your device.

You get to the homepage by clicking **Login**.

2.4 General instructions



The navigation in *portatour® Anywhere* is analogous to other web applications.

- You will find a navigation bar featuring a menu on the top of each page. More on this in the following chapter.

- As is typical for website navigation, you also get to the previous page in *portatour® Anywhere* by clicking the **Back**-button.
- Program functions are displayed as blue links, blue icons or buttons to click on.
- Most program function requests load a new page through the internet connection.
- **Loading** is displayed on the bottom of the screen and, depending on the connection speed, takes between milliseconds (broadband connection), half a second (fast 3G speed) and five seconds (slow GPRS-speed):



LOADING...

3. Menu structure

3.1 Main Menu

Navigation in *portatour® Anywhere* is done via the navigation bar at the top of the window and the navigation menu displayed to the right .

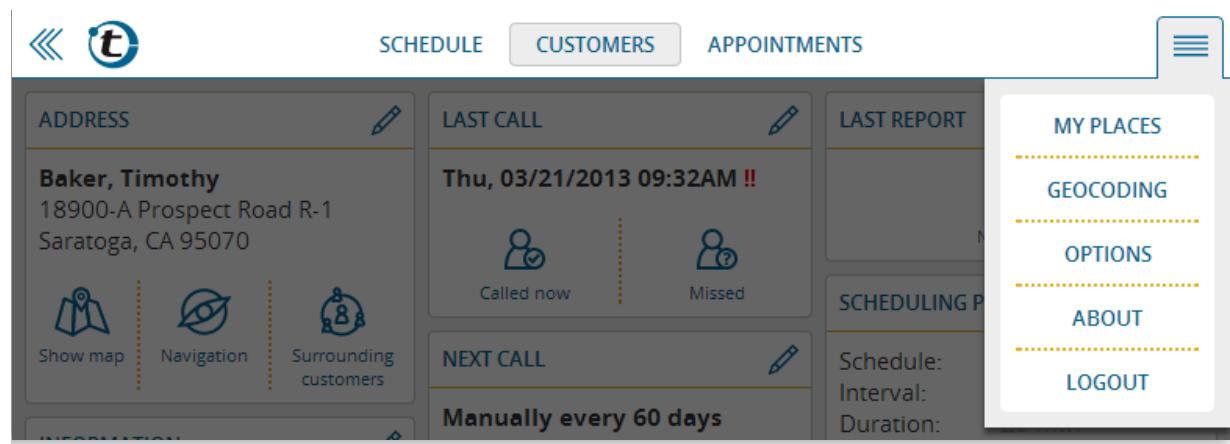
Navigation bar and menu lead to following program functions:

- Schedule
- Customers
- Appointments
- My Places
- Geocoding
- Options
- About
- Logout

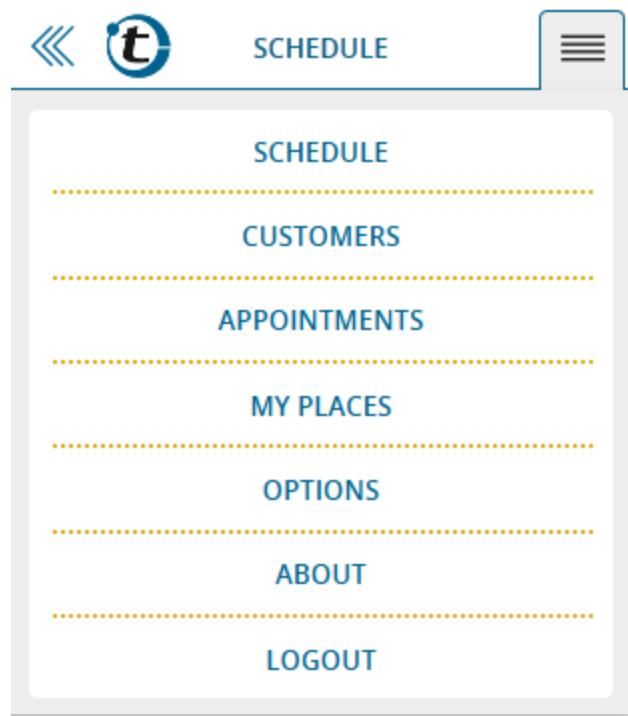
In the multiple column mode, the most important program functions **Schedule**, **Customers** and **Appointments** are shown directly in the navigation bar.



The remaining program functions can be accessed via the navigation menu , click to open them.



In the single column mode, all program functions are accessed via the navigation menu:

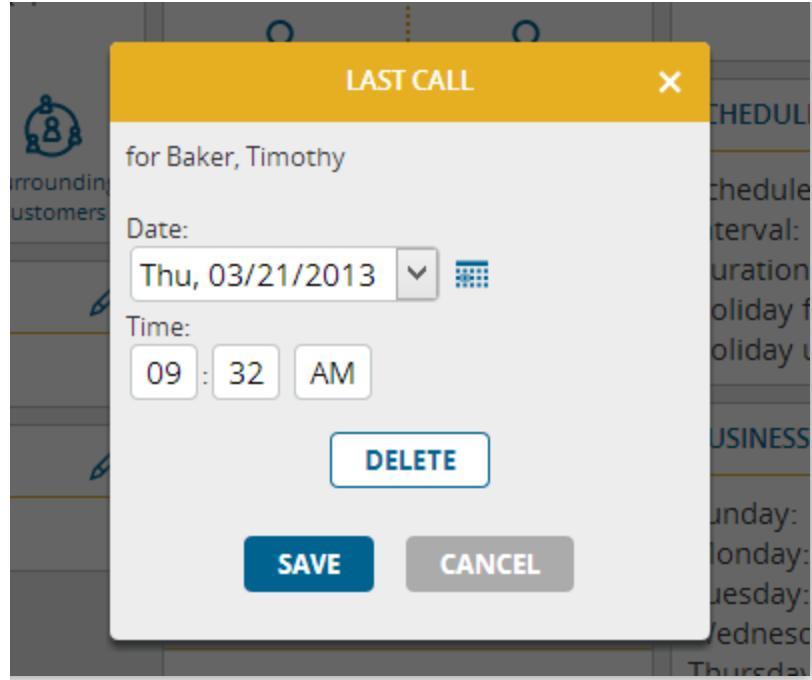


If there are current tasks or important notifications requiring your attention, the navigation menu is displayed in red. The important menu item is also displayed in red.

By clicking on the *portatour®* logo in the navigation bar you always get to the **Schedule**. The icon <<< in the navigation bar works like the back button in your web browser.

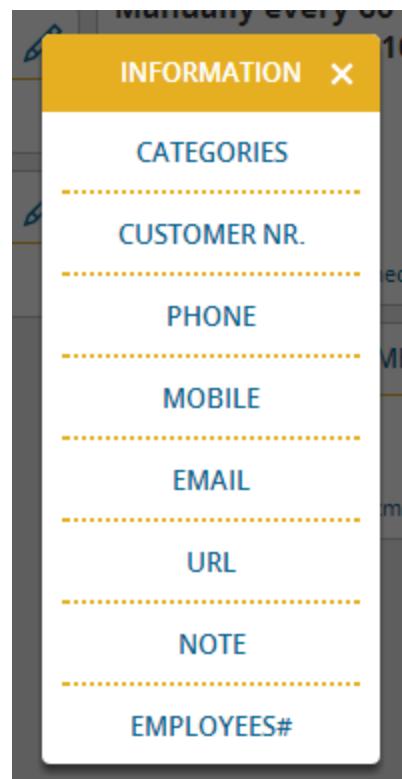
3.2 Popup-window

Sub-menus and pages to edit data are displayed in popup-windows in *portatour®*. Thereby, the remaining window is darkened. On devices with small screens, the pop-up window often takes up the whole screen and you cannot or just hardly see the darkened background.



In popup-windows to edit data, you have following options to navigate:

- **Save** stores your changes and closes the window.
- **Cancel**, the X-icon in the title bar, the **Back-Button** in the web browser and the **ESC-key** on the keyboard close the window without saving the changes made.

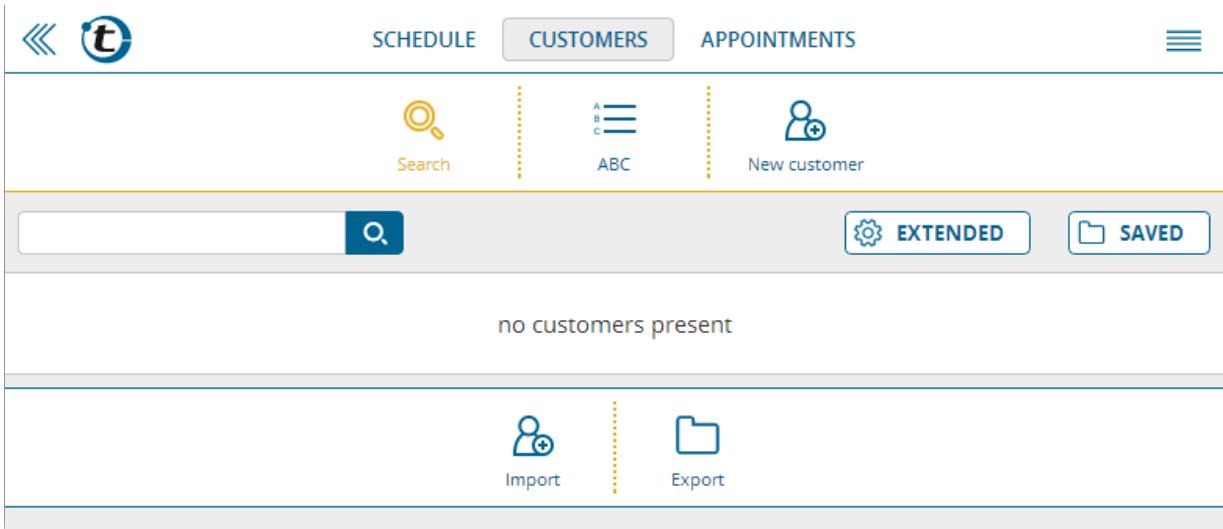


There are following navigation options in popup windows with menus:

- By **selecting a menu item** the popup window is closed and the function selected is performed.
- The X-icon in the title bar, the **Back-Button** in the web browser, the **ESC-key** on the keyboard or **clicking besides the window** in the dark background close the window without selecting a menu item.

4. Import customers

As an alternative to manually creating individual customer records (see section "Create customers" on page 53) *portatour*® enables you to mass-import customer data from Excel-, OpenOffice- and text documents. Simply open **Customers** in the main menu and click on **Import**.



The import is done step by step. With the buttons **Next** or **Back** at the bottom you can jump to the next or previous step. Your input will be preserved.

Hint: If you stop your activity in the browser for a few minutes during the importing process, then *portatour*® automatically aborts the import. To manually cancel the import, either close the browser window or click on a different item in the main menu.

If you have not set your home location in *portatour*® yet, you will now be prompted to do so (see section "Home location" on page 90). Entering your country is particularly important. Customers without explicit indication of a country will be automatically assigned to your home country.

4.1 Import mode

If you want to import your customers for the first time, select **Create Customers**.

If you want to update individual fields of existing customers that have already been imported, select **Update Customers** (see section "Update customers" on page 25).



SCHEDULE

CUSTOMERS

APPOINTMENTS



Import: Choose mode

Creates a customer for every record. Existing customers will not be changed. This mode is recommended for your first import.

CREATE CUSTOMERS

Imported records are mapped to existing customers based on key fields. You can specify whether to update or keep existing data per field. Nonexistent customers will be created.

UPDATE CUSTOMERS

4.2 Choose file

In the next step, you will select the source file your customers will be imported from. Note that portour® allows a maximum of 1,000 customers for sales-route planning – thus the import is limited to files with a maximum of 1,000 rows.

CUSTOMERS

Import: Upload file

Upload the file containing your customer data. Supported formats: Excel (.xls, .xlsx), Open Office (.ods), text (.csv, .txt). Maximum file size: 10MB. Maximum number of customers: 1000. The columns do not need to adhere to a predefined scheme.

File:
Choose file

UPLOAD

Click **Choose file** or the adjacent icon and locate the file in the file selection dialog. The supported formats are listed in the application. Only the files that match the selected type will be displayed in the selection dialog.

Hint: Complex filter or formulas in Excel files may potentially cause errors when importing the file. If this is the case, copy the cells of the source file and paste them as **Values** into a new Excel file using the Windows clipboard, and then import this new file.

Hint: For source files in CSV or TXT format, you have to configure the separator and encoding of the file. If you do not know the encoding, try different options and check the preview of the data in the next steps. If umlauts and special characters are not displayed correctly, try using a different encoding. Unicode (UTF-8), US-ASCII and Western European (Windows) are widespread.

4.3 Select Worksheet

If the source file is an Excel- or OpenDocument file and has several worksheets, select the worksheet from the customer data you want to import in this step:

The screenshot shows a software interface for importing customer data. At the top, there are navigation icons (back, forward, search, etc.) and tabs for 'SCHEDULE', 'CUSTOMERS' (which is selected and highlighted in blue), and 'APPOINTMENTS'. Below the tabs, the title 'Import: Select Worksheet' is displayed. A message indicates that the file contains more than one worksheet and asks to choose the one containing the customers to import. The main area shows a data preview table with columns: ID, Code, Given Name, Surname, Name, County, Street, and Street. The table contains 13 rows of sample data. At the bottom of the preview area are 'BACK' and 'NEXT' buttons, along with navigation arrows for the entire page.

ID	Code	Given Name	Surname	Name	County	Street	Street
1	07100740730143	Sandra	Carter	Carter, Sandra	Contra Costa	847 Brookside Drive	847 Bro
2	07100740730135	Dennis	Baker	Baker, Dennis	Contra Costa	5555 Giant Highway	5555 G
3	57105795730072	Shawn	Robinson	Robinson, Shawn	Yolo	175 Walnut Street	175 W
6	43104394330395	Vincent	Sanders	Sanders, Vincent	Santa Clara	100 Skyport Drive	100 Sk
9	21102152130037	Crystal	Allen	Allen, Crystal	Marin	160-B North San Pedro Road	160-B North
11	43104394330320	Diana	Watson	Watson, Diana	Santa Clara	1290 Ridder Park Drive, MC213	1290 Ridder I
13	48104880123331	Kimberly	Sullivan	Sullivan, Kimberly	Solano	2301 Pennsylvania Avenue	2301 Penn
...

This step will be skipped automatically, if only one worksheet with data is available.

4.4 Select header row

In the data preview, click on the row with the column headings.

Does your file contain a header? If yes, select it. Otherwise select "No header".

No header

ID	Code	Given Name	Surname	Name	County	Street	Stre
1	07100740730143	Sandra	Carter	Carter, Sandra	Contra Costa	847 Brookside Drive	847 Bro
2	07100740730135	Dennis	Baker	Baker, Dennis	Contra Costa	5555 Giant Highway	5555 G
3	57105795730072	Shawn	Robinson	Robinson, Shawn	Yolo	175 Walnut Street	175 W
6	43104394330395	Vincent	Sanders	Sanders, Vincent	Santa Clara	100 Skyport Drive	100 Sk
9	21102152130037	Crystal	Allen	Allen, Crystal	Marin	160-B North San Pedro Road	160-B North
11	43104394330320	Diana	Watson	Watson, Diana	Santa Clara	1290 Ridder Park Drive, MC213	1290 Ridder
13	48104880123331	Kimberly	Sullivan	Sullivan, Kimberly	Solano	2301 Pennsylvania Avenue	2301 Penn
...	

In subsequent import steps, the column headings are used as field description. If your file does not have any headings, select **No headline**. In this case, the columns are marked alphabetically (column A, column B, ...).

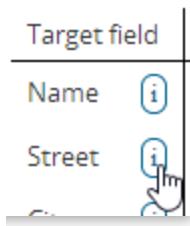
4.5 Field assignment

In the next four steps you will carry out the assignment between customer target fields in *portatour®* and the columns of your source file.

Target field	Source column	Preview
Name	Name	Carter, Sandra
Street	Street	(highlighted)
City	ID	
State	CDSCode	
ZIP	Given Name	
Country	Surname	
	Name	
	County	
	School	
	Street	
	StreetAbr	

In the column **Target field**, the fields of customers are listed. In **Source column**, you will find a dropdown menu with current fields in your data file. Match both. You get a **Preview** for each field, which facilitates matching. By selecting an empty entry (first row in the selection), an existing assignment is cleared.

Click **(i)** to receive information about a field:



A window with further information appears:



4.5.1 Address fields

The address fields include name and address of the customer. These fields are required. The customer address should be as complete as possible, i.e. ZIP code, city and street (including house number). The indication of the state or country is optional. Customers without the indication of a country are automatically assigned to your home country (see section "Home location" on page 90).

4.5.2 Information

The information fields in *portatour®* will be displayed on the customer details page (e.g. phone numbers, fax, email, note, ...). The assignment of these fields is optional.

Hint: These information fields are so-called "custom fields" which can be altered in the *portatour®* options, either by you or your administrator. I.e. Further fields could be assigned at this import step.

4.5.3 Scheduling fields

On this page you will find the fields that *portatour®* uses for sales-route planning. They are optional. The default settings that you set in the *portatour®* options (see "Scheduling parameters of customers" on page 91) count when either no fields are assigned or the fields in the import file are empty.

Hint: Further information is shown by clicking on ⓘ.

Target field	Explanation see...
Schedule automatically	"Schedule Calls Automatically / Manually" on page 72
Last Call	"Last Call" on page 63
Last missed call	"Last Call" on page 63
Activation date	"New customers" on page 65

Target field	Explanation see...
Call interval	"Call interval" on page 72 You can either set the interval in days or enter the desired amount of calls per year. An interval of 0 days will be valued as "no interval", meaning that the customer will not be scheduled automatically by portatour®.
Call duration	"Call duration" on page 73 Set the unit of the value in the source file (minutes, seconds, hours).
Holiday from, Holiday until	"Holiday from/until" on page 73
Geo-location	"Edit address" on page 59 In course of the import process, the Geo-location of a customer will be determined automatically by portatour® based on the address ("geo-coding"). Therefore, this field does not have to be specified. By assigning the geo-location fields, automatic geo-coding is deactivated. In this case, your source file should have accurate and updated geographic latitude and longitude coordinates.
Include in "My Places"	"My Places" on page 84
Preferred Accommodation	"Preferred Accommodation" on page 85
Call Note	"Edit call note" on page 68
Portatour ID	This ID can be used to create a clear assignment between imported rows and existing customers.

For the fields **Call interval** and **Call duration**, you can set how to interpret the assigned values from the source file in an additional selection box:

Call interval	<input type="button" value="i"/>	Interval <input type="button" value="▼"/>	Call Interval <input type="button" value="▼"/>	30 days
Call duration	<input type="button" value="i"/>	Minutes <input type="button" value="▼"/>	<input type="button" value="▼"/>	
Holiday from	<input type="button" value="i"/>	Minutes <input type="button" value="▼"/>	<input type="button" value="▼"/>	
Holiday until	<input type="button" value="i"/>	Seconds <input type="button" value="▼"/>	<input type="button" value="▼"/>	
		Hours <input type="button" value="▼"/>	<input type="button" value="▼"/>	

A warning message appears, if faulty data is found:

Call interval	<input type="button" value="i"/>	Interval <input type="button" value="▼"/>	Code <input type="button" value="▼"/>	The value could not be interpreted as time span in days.
Call duration	<input type="button" value="i"/>	Minutes <input type="button" value="▼"/>	<input type="button" value="▼"/>	

4.5.4 Business hours

On this page you can import the individual business hours of customers. The indication of business hours is optional. The default settings, that you set in the *portatour®* options "Business Hours of customers" on page 93 only apply if either no field assignments are set or the fields from the import file are empty.

Hint: Further information is shown by clicking on .

4.6 Preview and Import

Upon completion of field assignments, you can preview the records that are to be imported. Check whether the field contents shown correspond to the column headings.

Below you'll find all records with their mapped fields. Errors were detected with some of the records. If possible, fix those errors in your source file or change the mappings to avoid them. If you choose to import as is, erroneous fields will be left blank.

All records (259) Only erroneous records (2)						
Name	Street	City	State ZIP	Country	Customer nr	Schedule automatically
Carter, Sandra	847 Brookside Drive	Richmond	CA 94804	USA	1	yes
Baker, Dennis	5555 Giant Highway	Richmond	CA 94806-6002	USA	2	yes
Robinson, Shawn	175 Walnut Street	Woodland	CA 95695-3154	USA	3	yes
Sanders, Vincent	100 Skypoint Drive	San Jose	CA 95110-1374	USA	6	yes
Allen, Crystal	160-B North San Pedro Road	San Rafael	CA 94903	USA	9	yes
Watson, Diana	1290 Ridder Park Drive, MC213	San Jose	CA 95131-2304	USA	11	yes
Sullivan, Kimberly	2301 Pennsylvania Avenue	Fairfield	CA 94533-1966	USA	13	yes
Mitchell, Joseph	255 West Beamer Street	Woodland	CA 95695	USA	15	yes
Collins, Douglas	250 Buckeye Street	Woodland	CA 95695	USA	17	yes
Walker, Chad	5340 Skylane Boulevard	Santa Rosa	CA 95403-8246	USA	18	yes
Miller, Derek	222 Glacier Drive	Martinez	CA 94553	USA	20	yes
Scott, Jose	Po Box 625	Winters	CA 95694	USA	22	no
Howard, Roger	285 W. Beamer Street	Woodland	CA 95695	USA	23	yes
Martinez, Kenneth	Rt 1. Box 178	Esparto	CA 95627	USA	24	yes

[BACK](#) [IMPORT](#)

Values recognized by *portatour®* as faulty are shown in red, and the reason for the error is displayed. Click **Only erroneous records** to filter the preview by faulty records.

Hint: We recommend to correct errors by editing the field assignments or by editing the source file – to fix it before importing. A subsequent revision of mistakenly imported customers would be too time-consuming in most cases.

4.6.1 Import

Launch the import process with the **Import** button.

In course of this process, the imported customers will be located on the map by *portatour®* ("geo-coding"). Depending on the number of customers that are to be imported, this process may take up to a minute to complete.

Upon completion you will receive a summary that may show errors and warnings (see section "Resolve import errors" on the next page)

Hint: The import settings are saved automatically for future use. Your field assignments will be available again for the next import, in case the column headings of the source file remain unchanged.

4.6.2 Resolve import errors



Following errors or warnings may occur in course of the importing process:

- Customers could not be located on the map exactly, or not at all. These customers can be found in the main menu in **Geocoding**, see section "Geo-coding warnings" on page 104.
- Customers with incorrect data values in fields (preview highlighted in red) will still be imported, but the incorrect values will be replaced by the default value or left blank.
- Customers without names are labeled "<no name>".

4.7 Update customers

If you want to update existing customers, select **Customers > Import > Update customers**. Then select the file with the updated data. Details on importing can be found in the section "Field assignment" on page 21.

Merging of customers from the newly uploaded file with existing customers happens on the basis of one or more key fields, specified in course of assigning fields. Set the respective row to be a **Key** row using the drop-down menu:

Target field	Source column	Update	Preview
Categories		Overwrite	
Customer nr.	ID	Key	1

The customer number, for example, would be a good key field. A key field requirement is unambiguous. If you cannot find a unique field, highlight several fields as key fields – e.g. company name, street and postcode. In this case, the combination of these fields must be unique for a single customer. A maximum of 8 key fields is allowed. If, during the updating process, *portatour®* does not find an existing customer with matching key, a new customer will be created.

Hint: If the import file has been previously exported from *portatour®* in Excel- or Open document format (see section "Export customers" on page 54), then all field assignments are already completed, and the unique Portatour ID will be used as key field

For all other assigned fields, you can specify in the drop-down menu whether to keep the value of the existing customer or to overwrite it with the value from the uploaded file.

If, for example, you only want to update the call interval field, but want to make sure that existing notes are not overwritten, select 'overwrite' for the call interval and 'keep' for the remaining fields. The notes field of the import file is only used when a customer is newly created as a consequence of no customer having a matching key.

If you only intend to update existing customers without creating new ones, it suffices that your import file contains the key column (e.g. customer number) and the field to be updated (e.g. call interval).

Prior to launching the actual importing process, you get a summary on the last page of the importer, which contains how many customers from the import file will be assigned to existing customers. Check whether the number meets your expectations, in order to detect possible errors in the key field selection.

Start the updating process with **Import**.

Hint: An import or update cannot be undone! Therefore, we recommend to export and thus save your customers prior to mass data updates (see section "Export customers" on page 54).

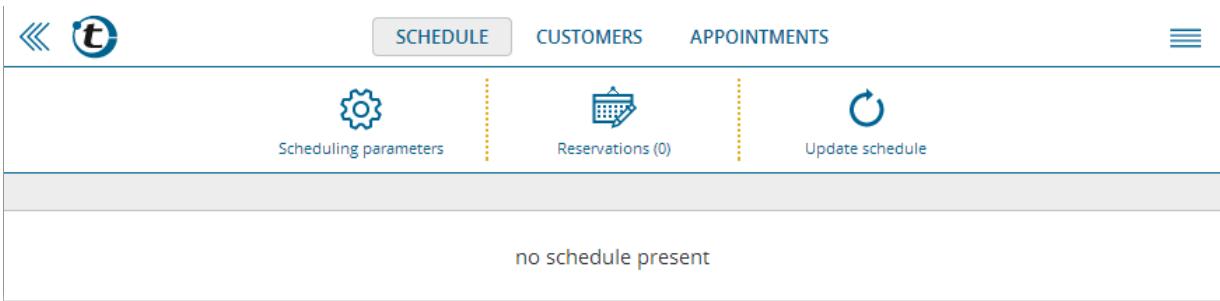
5. Schedule

The schedule is at the heart of *portatour®*. Here, *portatour®* presents the optimized sales-route.

By clicking **Schedule** in the navigation menu, you get to the schedule calculated last. Alternatively, click the *portatour®* logo in the navigation bar.

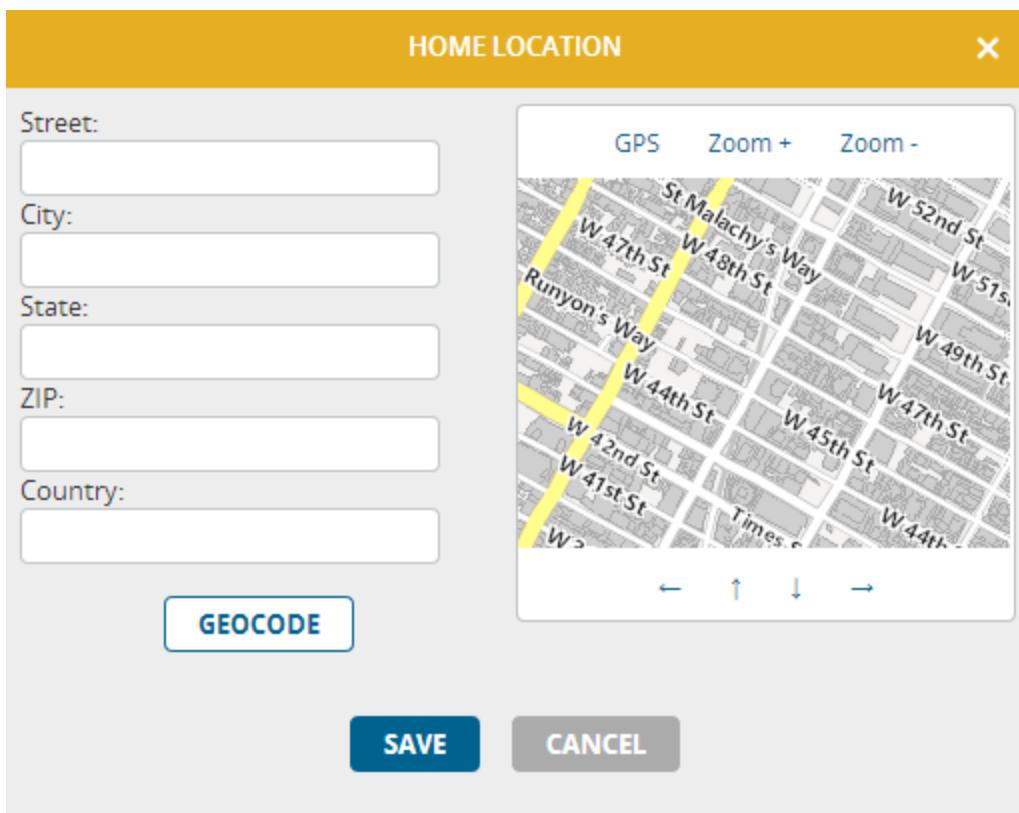
5.1 First use

If you use *portatour®* for the first time, there is no schedule available for you just yet:



Start the calculation using **Update schedule**. You will be prompted to enter your home location once.

5.1.1 Set home location



Home location is the address you usually start and end your daily sales-route with. Entering the country is essential to avoid ambiguity: all customers without a country set, are assigned to your home country. After complete entry of the address, click **Geocode** in order to locate the address on the map. If geo-coding does not deliver the desired result, you can manually adjust the position on the map.

(see section "Set geo-location manually" on page 103) or use the GPS function of your mobile phone for geo-coding (see section "Determine GPS location" on page 104).

Click **Save** to apply your changes.

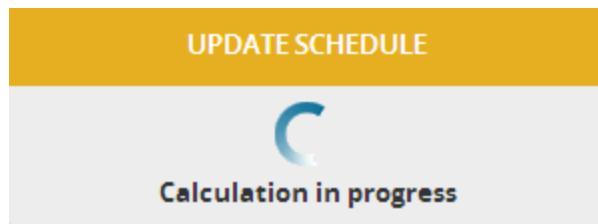
5.2 Schedule calculation

Click **update schedule** to let *portatour*[®] calculate your schedule for up to 28 calendar days in advance.

portatour[®] takes care of the selection of customers to be called while optimizing the distance to be covered. To do so, *portatour*[®] uses following data and information:

- your home location (see section "Home location" on page 90)
- the business hours and current time provided (see section "Working hours" on page 86)
- the settings for overnight stay on the way (see section "Overnight stay on the way" on page 89)
- the fundamental scheduling parameters (see section "Scheduling parameters of customers" on page 91)
- the customers, especially the last call date and location (see section "Last Call" on page 63)
- the individual scheduling parameters (see section "Scheduling parameters" on page 71)
- the customers you included in the schedule (see section "Edit schedule" on page 33)
- the appointments in your calendar (see section "Appointments" on page 78)

The update takes – depending on the amount of customers, scheduling period and current server load – between 3 seconds and 2 minutes. Tips for speeding up the process can be found in "How can I accelerate the calculation of schedules?" on page 115. Meanwhile, you can see an animation with the progress message:



When the update is completed, you will automatically return to the schedule. Errors and warnings in course of the update will be displayed on a separate page - see section "Warnings" on page 39.

5.3 Display

The screenshot shows a software interface for route planning. At the top, there are tabs for 'SCHEDULE', 'CUSTOMERS', and 'APPOINTMENTS'. Below the tabs are three buttons: 'Scheduling parameters' (gear icon), 'Reservations (0)' (calendar icon), and 'Update schedule' (refresh icon). The main area displays a daily schedule for Tuesday, May 2nd, from 9:30 AM to 3:10 PM. The schedule includes:

- 9:30 AM: home
- 25 min for 20.6 mi to Martinez, 94553
- 9:55 AM - 10:35 AM: Miller, Derek (customer) → show new product factsheet (checkbox is checked)
- 7 min for 3.3 mi to Concord, 94520
- 10:43 AM - 11:23 AM: White, Brett (customer)
- 15 min for 9.2 mi to Walnut Creek, 94595
- 11:38 AM - 12:18 PM: Perry, Holly (customer)
- 9 min for 3.6 mi to Lafayette, 94549
- 30 min work break
- 12:57 PM - 1:37 PM: Turner, Jacob (customer)
- 15 min for 10.2 mi to Orinda, 94563-4330
- 7 min Waiting time
- 2:00 PM - 2:30 PM: Sales Telco (appointment)
- 2:30 PM - 3:10 PM: Nelson, Michael (customer)
- 15 min for 8.9 mi to Oakland, 94618
- 3:25 PM: home

At the bottom, there are three buttons: 'Map' (location pin icon), 'Convert fixed reservations to appointments' (file icon), and 'Delete schedule' (trash bin icon).

In the lines with white background, the **customers to visit** are shown as well as the arrival- and departure time of the call. By clicking on the row of a customer or an appointment, a page with a detailed view of the customer or the appointment is opened. Customers suggested for calls can be distinguished from pre-arranged appointments through the icon on the left of the row.

You can either determine the default call duration in *portatour®* options – see section "Scheduling parameters of customers" on page 91 – or individually for each customer – see section "Call duration" on page 73. If a customer has already been called on that day, he/she will be check-marked. For customers with limited business hours, the business hours of the current day will be shown below the cus-

tomer name. This way, you know the leeway you have for this customer call. Where applicable, the call note you made will be displayed with an arrow – see section "Next call" on page 66.

In the gray lines between the customer calls, The required **drives (trips)** are displayed with duration, distance and destination.

- One- and two-column mode: The destination is entered with postcode and location.
- Three-column mode: The street of the destination is also shown.

Where appropriate, the lunch break (see section "Work break settings" on page 87) or customer waiting times are indicated.

Appointments without fixed location (e.g. phone calls – see section "Edit appointment" on page 79), will be scheduled "on the way" between two customer calls and are displayed as indented.

The schedule is displayed for one work day. Switching to another day is done by clicking to the desired date in the orange title bar. If you have scheduled more than 7 days, days will be grouped by calendar weeks to have a better overview:

Week 27	Week 28	Week 29	Week 30
	Mon 01.	Tue 02.	Wed 03. Thu 04. Fri 05.
10:20 AM home			
23 min for 19.2 mi to Concord, 94520			
 10:43 AM - 11:23 AM White, Brett			

At the end of the list you will find the daily summary of remaining miles (or kilometers) and customer calls.

If you do not need the drive information between customers, you can hide them with **Hide trips** in the program settings ("Schedule" on page 95). They can be displayed again with **Show trips**.

To display the due date (=urgency) of the call with an icon next to the customer, and according to call interval, select **Show urgency** from the program settings ("Schedule" on page 95). Information on call urgency and related icons can be found in the section "Due customers" on page 48 and "Icons in customer lists" on page 51. They are removed again with **Hide urgency**.

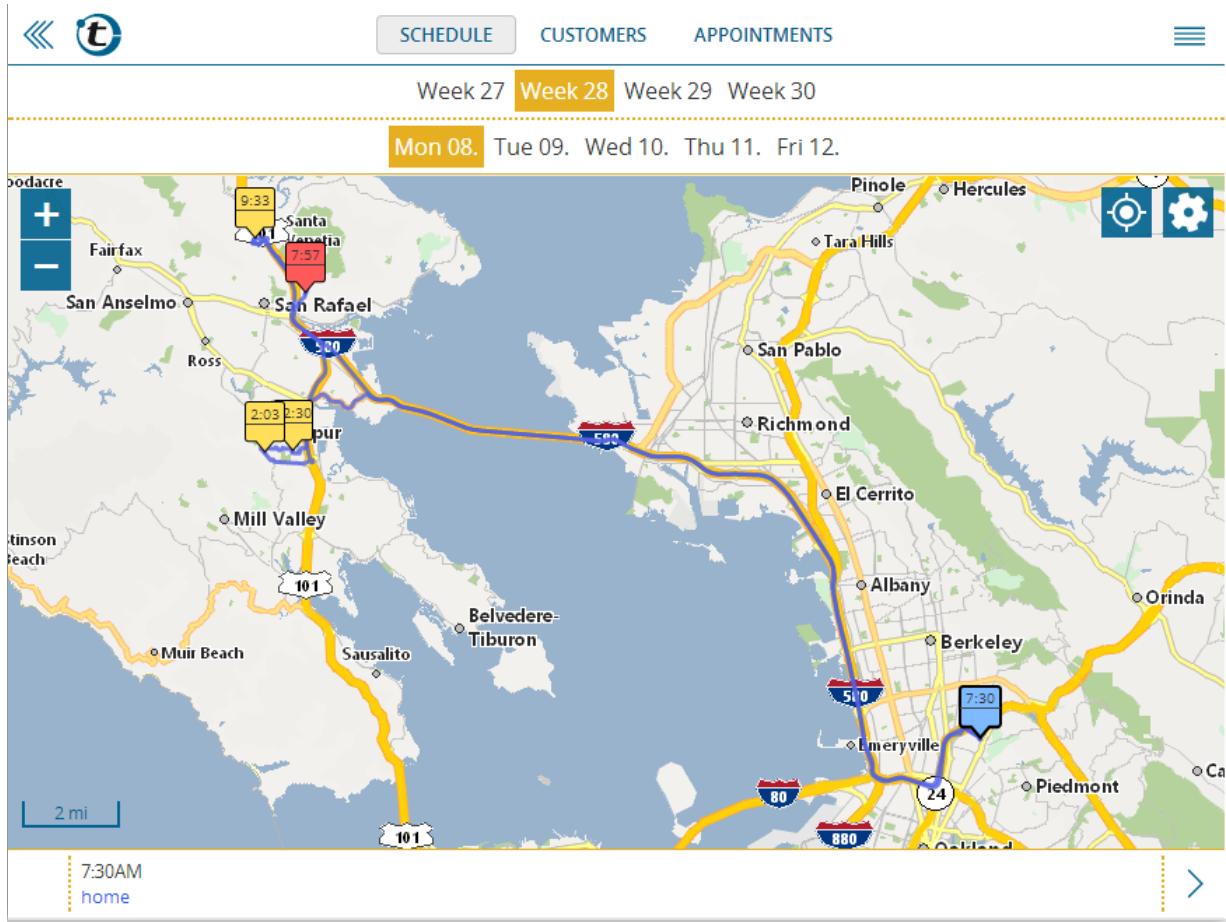
With the option **Delete schedule**, you delete the whole schedule and all reservations. For safety reasons, *portatour*® asks you to confirm this step.

To create an appointment in your calendar for each fixed call (see section "Keep/Fix customers for the schedule" on page 34), click **Convert fixed reservations to appointments**. For calls that have only been fixed by day (**Fixed Date**), the corresponding appointment will be set as "flexible on the day" in your calendar.

5.4 Map

By clicking on the **Map**, you get a geographical representation of the schedule including customers to be called and routes.

Note that this dynamic map view requires a powerful smartphone or tablet with a large touchscreen and at least a 3G internet connection.



You can move the map by moving your finger on the touch screen or dragging the mouse. You can zoom towards a spot on the map by double clicking it. Alternatively you can use the two zoom buttons on the top left of the map.

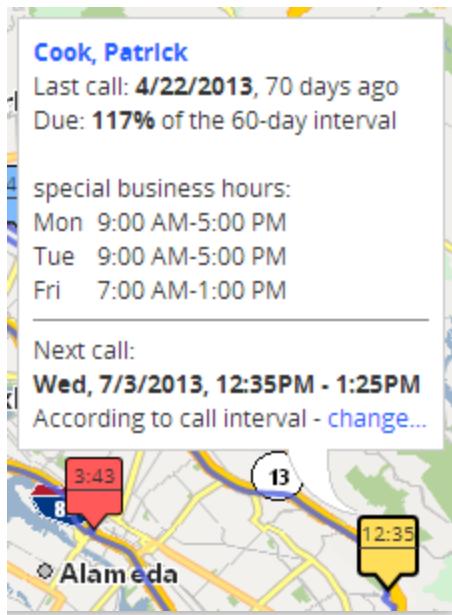
You can switch between days in the schedule by clicking the desired date on the title bar.

The markers show the customers that need to be called, while the color indicates the due date:

- 11:50 red = overdue
- 14:02 yellow = due now
- 11:18 green = not due
- 17:30 blue = appointment or point of departure/arrival

The icon displays the call time and whether the respective call is marked as reserved, to be kept in schedule, or is an appointment (see section "Edit schedule" on the next page).

When clicking on a customer marker, an info-bubble appears, displaying summary information of the customer. By clicking again or clicking on a different spot on the map the info-bubble closes.



A click on the customer name navigates you to the customer detail page. By clicking **change...** you can change the reservation of the customer – more on this in section "Edit schedule" on the next page.

The blue line shows the path of the sales-route as beelines. To switch to displaying actual routes on the road, click on the blue Options icon in the top right corner of the map and select **Schedule with routes**. The calculation of routes occurs on the *portatour®* Server and takes 2 to 10 seconds, depending on server capacity.

The footer shows the currently selected customer or the currently selected drive. The selection is highlighted in dark blue on the map. With the arrow keys "<" and ">" you can navigate to the preceding or following drives and customers according to schedule. A click on the customer name opens the info-bubble mentioned above.

You get back to the list view of the schedule using the back function in your browser or the <<< button in the navigation bar.

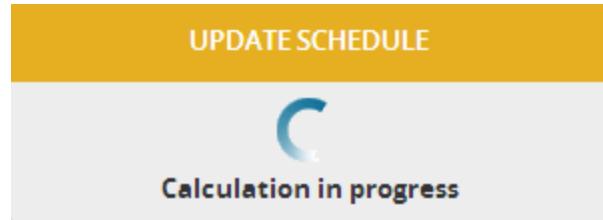
For more information on the map, see section "Customer Map" on page 55.

5.5 Update

With **Update schedule** you tell *portatour®* Anywhere to recalculate the schedule. This function is typically used when you have manually added a customer reservation (see section "Edit schedule" on the next page) or the proposed schedule does not hold in course of the day (e.g. customer missed now, traffic problems, overdrawn call duration, ...). The calculation is influenced as already described in "Schedule calculation" on page 28.

The update takes – depending on the amount of customers, scheduling duration and current server

load – between 3 seconds and 2 minutes. Tips for speeding up the process can be found in "How can I accelerate the calculation of schedules?" on page 115. Meanwhile, you can see an animation with the progress message:



When the update is completed, you will automatically return to the schedule. Errors and warnings in course of the update will be displayed on a separate page - see section "Warnings" on page 39.

5.6 Edit schedule

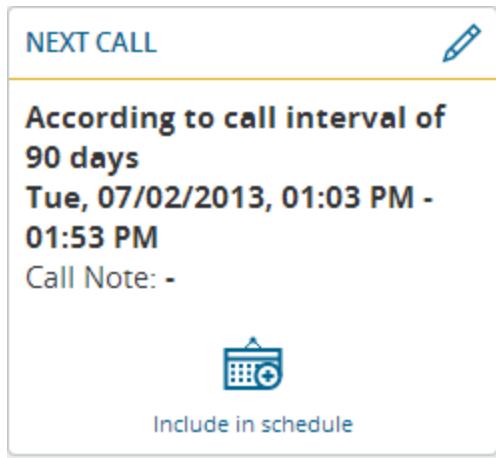
You have the option to manually adapt the *portatour®*-schedules by

- Including customers into the schedule,
- keep or fix suggested calls within the schedule, or
- Excluding customers from the schedule.

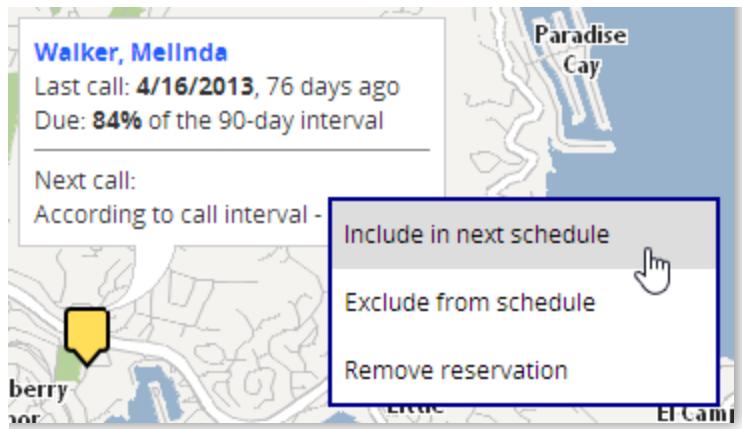
5.6.1 Include customer in schedule

If you absolutely want to call a customer in the next couple of days, but have not agreed on a specific date, you can add a reservation to "include" customers in the schedule so that they have to be considered and optimally ranked by *portatour®* in the schedule.

Open the customer detail page of the relevant customer (see section "Customers" on page 43). In the **Next Call** section, you will find the option **Include in schedule**.



Alternatively, you can include customers on the map: open the map (see section "Map" on page 31 or "Customer Map" on page 55) and click on a customer marker. An info-bubble opens when you can click **change...** and **Keep in schedule** (or **Include in schedule**).



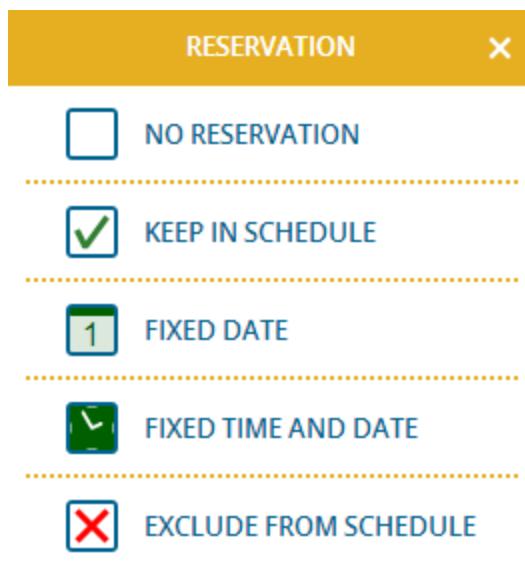
If you include customers in the schedule, the customer is initially added to the reservation list (see section "Reservation list" on page 36) and will be included during the next schedule update.

5.6.2 Keep/Fix customers for the schedule

On the schedule, you will find a drop-down menu next to each customer, through which you can set reservations to tell *portatour*® how to deal with the customer during future schedule updates.



You have following options besides the default setting **No reservation**:



- **keep in schedule:** This customer will be kept in an updated schedule, however, in terms of optimization *portatour*® may select any time and day within the schedule. Customers that are kept in the schedule through **Include in schedule** are automatically highlighted as **keep in schedule**, so that they are not excluded from a subsequent schedule update.
- **fixed date:** If you set a customer on fixed date, *portatour*® keeps this customer on the same day during subsequent schedule updates. Use this option if you intend to call the customer on exactly this day, for example if you already agreed with the customer on the day.

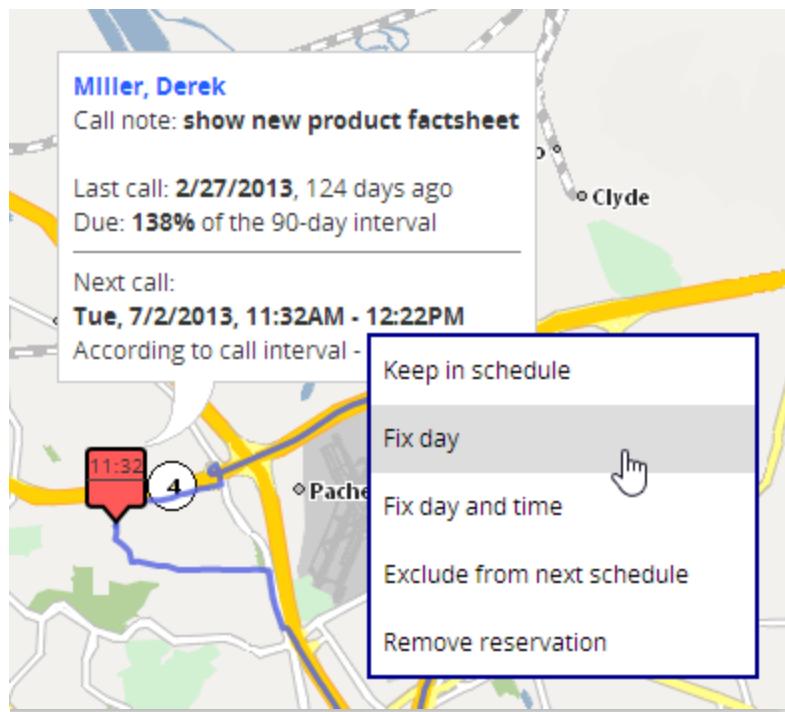
- **fixed time and date:** In addition to fixing the date, the exact time of the call can be set using fixed time and date. Note: by fixing the time, flexibility in schedules is noticeably reduced and route optimization is limited, for example when unforeseen postponements occur throughout the working day.
- **Exclude from schedule:** This customer will be excluded from schedules until this reservation is cleared again. Use this option if you do not want to call a customer, despite it being due for a call according to the call interval. Click Update Schedule after setting **Exclude from schedule**. After updating the schedule, the customer will be moved to the reservation list (see section "Reservation list" on the next page). There, you can remove the exclusion reservation at a later point in time.

After recording a call of a customer, reservations are automatically removed (see section "Last Call" on page 63).

A reservation (**Keep in schedule**, **Fixed date**, **Fixed time and date**, **Exclude from schedule**) can be removed by selecting the default setting **No reservation** from the drop-down menu. Through this, the common *portatour®* scheduling automatism based on call intervals comes back into operation.

In the footer of the schedule you will also find a drop-down menu, by which you can set reservations for all currently displayed customers of this day.

Similar to editing a reservation in the schedule list, it can be changed on the map. The choices are available by clicking **change...** in the info-bubble of a customer call.



You can see the current reservation status in the second row of the customer icon, where following abbreviations are used:

- keep** Keep in schedule
- d fix.** Fix date
- t fix.** Fix time and date
- excl.** Exclude from next schedule

5.6.3 Reservation list

The reservation list can be edited by clicking the **Reservations** menu item at the **Schedule**.



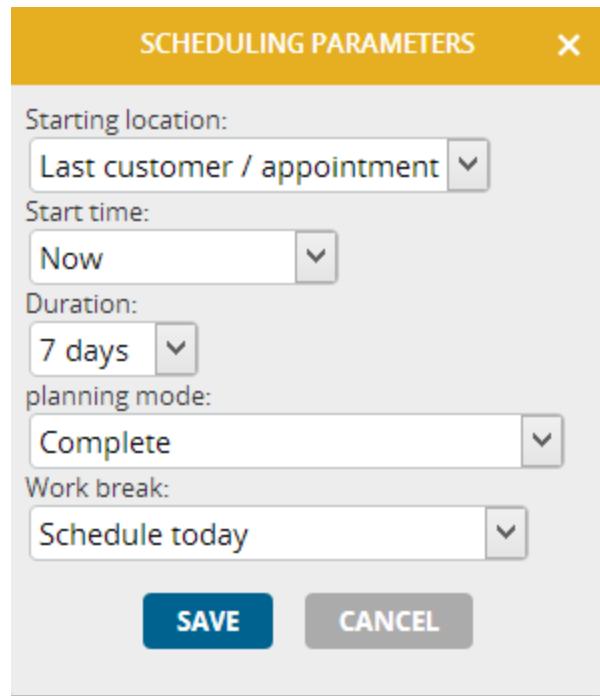
It contains the customers with reservations that have either not yet been scheduled (update needed), could not be scheduled (warning during update), or have been excluded from the schedule. The number in parenthesis next to the menu item indicates how many reservations the list contains.

A screenshot of the "RESERVATIONS" dialog box. It lists two entries: "Cook, Dana" and "Mitchell, Shawn". Each entry has a checkbox next to it; the first is checked (green checkmark) and the second is unchecked (red X). At the bottom of the dialog are "REMOVE ALL", "SAVE", and "CANCEL" buttons.

Similar to the way it works in the schedule, the reservations can be changed by selecting an option in the drop-down menu. Removing reservations works either individually by selecting **No reservation** or collectively through the menu item **Delete all**. Confirm the changes by clicking **Save**. By clicking **Cancel**, immediate changes in the list are discarded and you return to the schedule.

5.7 Scheduling parameters

portatour® schedules the current and six further calendar days by default, taking into account the home location provided as start- and end point of your sales-route. The subsequent parameters can be altered individually on the **Scheduling parameters** page.

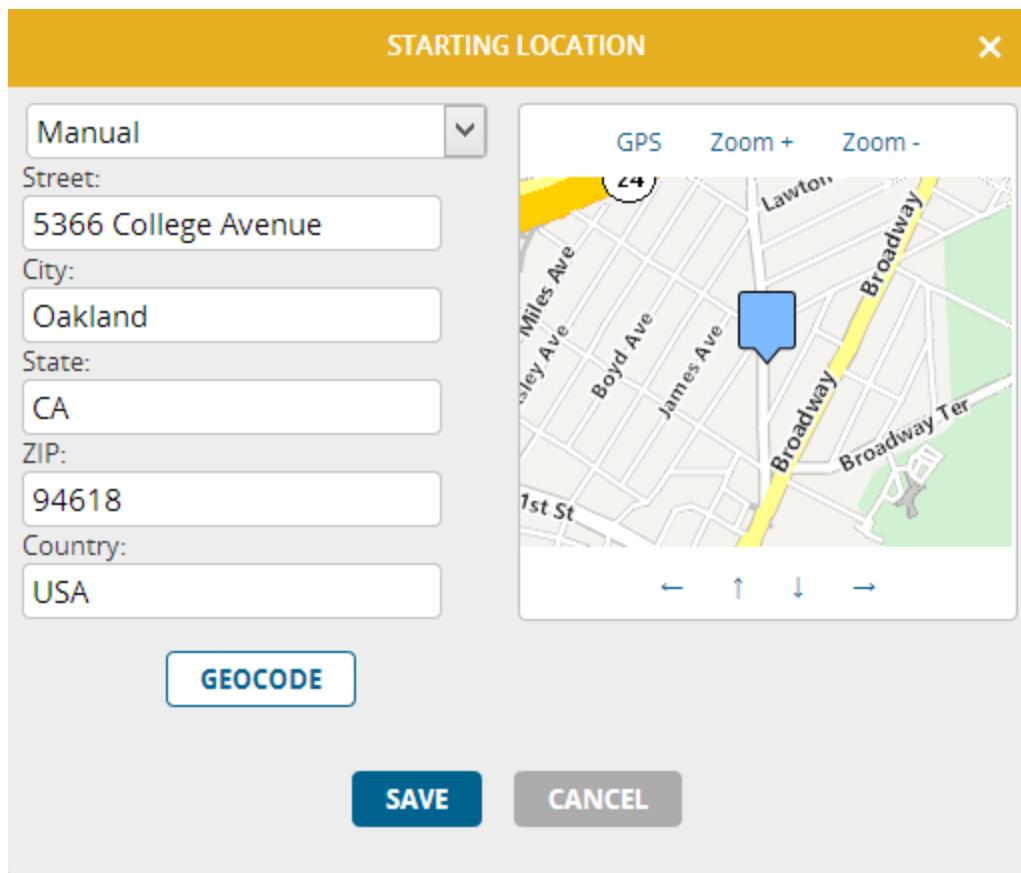


Modified scheduling parameter can be **Saved** or discarded with **Cancel**.

5.7.1 Starting location

If your schedule should not be calculated from your **home location**, because of an overnight stay on the way or because you are already on your way, you have the option to enter a different starting location:

- **Last customer / Appointment:** The schedule is calculated starting from the last customer call. *portatour*® uses the last customer that has been marked as **Called now** or **Missed now** (see section "Last Call" on page 63). If you have set **Automatic starting location** in your program settings (see section "Schedule" on page 95), *portatour*® automatically switches to **Last customer/appointment** in the morning after the last customer call.
- **Manual:** use this setting if you want to start your schedule from a different location than the last customer address. When clicking **Update schedule**, you will be prompted to enter the address of the starting location:



Enter the desired departure address into the form, then **Geocode** and **Save** it. Optionally, you can manually set the location on the map (see section "Set geo-location manually" on page 103) or use the GPS function for geo-coding (see section "Determine GPS location" on page 104). The manually entered address remains the starting location until you select another option (e.g. **Last customer**).

- **Start from a specific customer:** You can select any customer as starting point. However, selection takes place in the customer detail view of the desired customer, rather than in the scheduling parameters. To do so, open the customer detail view of the respective customer (details on locating and displaying customers can be found in "Customers" on page 43). In the section **Next Call** you can find the option **As Starting Location**. Select this option and update the schedule.

5.7.2 Start time

By default, the schedule is calculated from the point in time when you click **Update schedule**. The selection box shows **Now**. Outside of defined business hours, *portatour*[®] uses the start of your next working day as start time. The start time can be moved in 15-minute intervals, if, for example, you carry out the calculation during lunch break or in course of a customer call preparation, and can therefore not drive off immediately. Similarly, you can use one of the 31 upcoming days as starting point. The start of your work day set in the options will be used as start time (see section "Working hours" on page 86).

5.7.3 Duration

portatour[®] schedules **7 days** by default and only includes days with registered business hours (see section "Working hours" on page 86). 7 days is the recommended setting because each day of the week is scheduled exactly once.

A reduction of the scheduling period to **1 day** to **6 days** limits the possibilities for *portatour®* to optimally schedule customer calls accordingly. Use this option if you want to call manually included customers as soon as possible.

Extending the scheduling period to **8 to 28 days** is useful if you have to announce calls or have to make an appointment with customers in advance. There are 3 points to be considered:

- The number of calls is limited to 125 in the scheduling period. If you schedule for four weeks (=20 working days), an average of about 6 calls per day is possible. For three weeks there are about 8 calls per day, for two weeks about 12 calls per day, for one week about 25 calls per day. *portatour®* aborts the calculation if there are more calls in your call settings. If this is the case, shorten the scheduling period.
- The scheduling period is limited by the shortest customer call interval (see section "Call interval" on page 72 and "Scheduling parameters of customers" on page 91). Therefore, you can use the full 4 week scheduling period if none of your customers has a shorter interval than 28 days. If, for example, you have customers with an activated call interval of 14 days, then the maximum scheduling period is also 14 days.
- Generally, the longer the scheduling period, the more complex and thus longer the calculation. 4-week schedules for many potential customers could take up to a minute computation time. Use longer scheduling periods above 7 days only if you absolutely need the schedule for the following week(s).

5.7.4 Planning mode

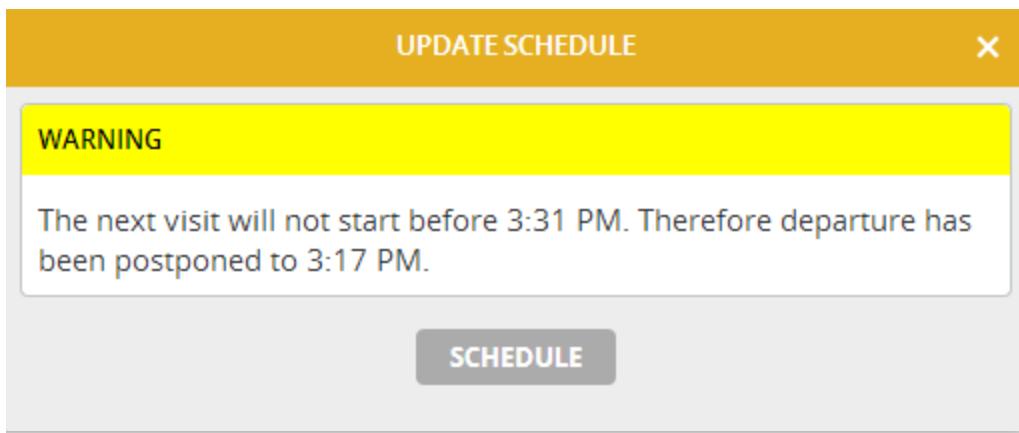
For the planning mode you can choose between **Complete** or **Reservations & appointments only**. In the complete mode, the schedule includes both appointments and customers that had previously been included, as well as excluded customers. In the **Reservations & appointments only** mode only customers marked to be included and appointments are added to the calculated schedule.

5.7.5 Work break

Here, you can set whether your work break should be **Scheduled today** or whether you **already had a work break today**. The settings from the *portatour®* Options (see section "Work break settings" on page 87) will be used to schedule breaks. If breaks are generally switched off, then this selection box will not be displayed.

5.8 Warnings

During the calculation of the schedule, *portatour®* can show warnings. Subsequently, the most common warnings are explained together with their causes and possible solutions:



5.8.1 Reservations could not be scheduled

This warning appears when you have reserved customers for call schedule calculation which could not be taken into account by *portatour®*. The reservations that have not been scheduled can be found in the Reservations list (see section "Reservation list" on page 36). Possible causes are:

- You have included too many customers in the schedule. Therefore, it is not possible to call all these customers within the days scheduled (1 to 28 days). Still, *portatour®* has scheduled as many customers as possible and left the rest in to Reservations ribbon. Solution: Limit reservations to key customers, extend the scheduling period, or extend your working hours.
- The customer that has not been scheduled has no or very limited business hours, which are either outside of your working hours or in conflict with the limited business hours or a different customer or appointment. Solution: Extend your working hours, the business hours of the customer or enter an appointment with this customer manually.
- The non-scheduled customer is located far away from your home location so that it cannot be reached within the working hours. Solution: Check the call address of the customer, extend your working hours, enter an appointment with this customer manually or enable the option "overnight stay on the way" in *portatour®* options.
- The customer has no address information or the address could not be geo-coded. Open the detail view of the customer and edit or geo-code the address (see section "Edit address" on page 59).

5.8.2 Appointments cannot be scheduled

This warning appears when you have entered appointments, but *portatour®* could not accommodate them in the schedule. Possible causes are:

- The appointment collides with another of your appointments. Either the appointments overlap in time or the free time between appointments is not enough to drive from the first to the second appointment. Solution: move or shorten the appointments or increase the time frame available for the appointment.
- The appointment is located far away from the starting point or it takes too long to get there, undertake the appointment and drive back to the home location all within one day. Solution: Check the appointment address, shorten the appointment or enable the *portatour®* option "overnight stay on the way".

5.8.3 Unexact beelines have been used for schedule calculation

This warning appears when you undertake schedule calculation for the first time, use a manually entered address as starting point, did create a new customer or appointment or have changed addresses. In terms of route optimization, *portatour®* makes use of up-to-date road maps and calculates the real road distance and travel times between all customers. For example, since for 500 customers $250.000 (=500 \times 500)$ calculations need to be computed on the server, which take some time, it may happen that during calculation of your schedule these distance calculations are not ready yet, and therefore, approximate distances and times based on beelines are provided. We recommend that you wait for the exact distance calculation on the server and restart the schedule calculation at a later point in time.

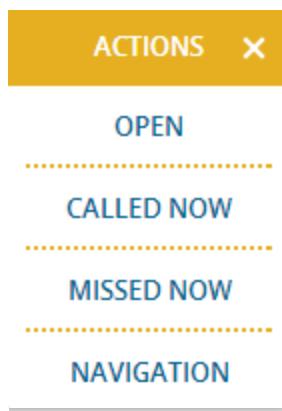
5.8.4 Addresses without geo-location

When entering customers, when importing customers from the IT system of your organization, or when importing customers from Excel, not all customers could be geo-coded correctly, e.g. located on the map. Customers without geo-location can not be included in the schedule. Check the geo-location. An instruction can be found in the "Geo-Location" on page 100 section.

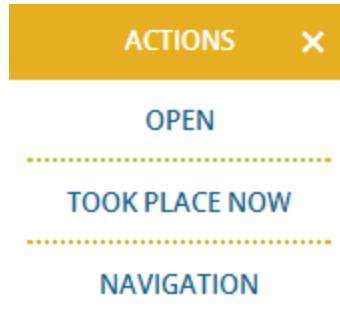
5.9 Context menu for schedule

Common actions for customers and appointments in the schedule are directly accessible via the context menu in the schedule. On desktop PCs, you can open the context menu by clicking the right mouse button on a line of the schedule, on touch screen devices, you can tap the line for about 1 second.

Actions for customers:



Actions for appointments:



With **Open**, you can get to the detail page of the customer (see section "Customer detail page" on page 58), or the appointment (see section "Appointment detail page" on page 78).

Called Now, Missed Now and Took Place Now mark the customer or appointment respectively (see sections "Last Call" on page 63 and "Appointment took place" on page 79).

Navigation launches the navigation program of your device with the address of the selected customer or appointment (see section "Navigation" on page 61 and "Appointment detail page" on page 78).

All actions can also be accessed via the customer- or appointment detail page (see sections "Customer detail page" on page 58 and "Appointment detail page" on page 78).

6. Customers

You get to the customer list by clicking the link **Customers** in the navigation bar.



The screenshot shows the customer list interface. At the top, there are three tabs: SCHEDULE, CUSTOMERS (which is selected), and APPOINTMENTS. Below the tabs are three icons: a magnifying glass for Search, a grid for ABC, and a person icon for New customer. A search bar with a magnifying glass icon is followed by two buttons: EXTENDED and SAVED. The main area displays a list of customers. The first entry is for Turner, Thomas, Saratoga, 95070, with a due date of 7/1/2013 and a note to "Bring 2013 catalog". The second entry is for Turner, Frank, Corte Madera, 94925, with a due date of 6/27/2013 and a note to "Call: Ordered". The third entry is for Butler, Bobby, Santa Rosa, 95401, with a due date of 6/27/2013 and a note to "13% of 30 days". There are also links for "Last week (6/23/2013 - 6/29/2013)" and "Monday, 07/01/2013". On the right side, there is a Map button.

Customer Name	Last Activity	Notes
Turner, Thomas Saratoga, 95070	7/1/2013 0% of 60 days	Bring 2013 catalog Call: Ordered
Turner, Frank Corte Madera, 94925	m 6/27/2013 4% of 90 days	
Butler, Bobby Santa Rosa, 95401	6/27/2013 13% of 30 days	

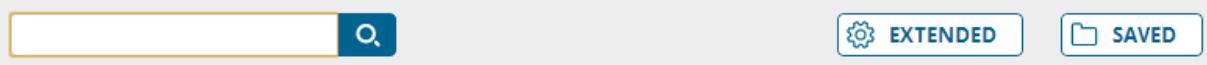
There are different ways to quickly find individual customers in the database.

When opening the customer list, all customers will be displayed in descending order, sorted by last activity.

In the usual navigation bar there is a sub-menu with options such as **Search**, **ABC** and **New Customer**. These options are described in the subsequent sections.

6.1 Quick search

The search bar is displayed by selecting the sub-menu **Search**. You will find the input box for quick search on the left.



The screenshot shows the search input field and its associated buttons. The input field is empty, and the EXTENDED and SAVED buttons are visible.

After having entered the keyword for quick search, click the button next to the input box or press Enter. The result list shows all customers whose name contain the keyword. Search is not case-sensitive. The list is sorted alphabetically by default.

SCHEDULE CUSTOMERS APPOINTMENTS

Search ABC New customer

andre EXTENDED SAVED

3 of 260 customers ordered by "Last activity" Map

Last week (6/23/2013 - 6/29/2013)

Reyes, Andrea San Jose, 95148-3122	6/23/2013 8% of 90 days
June 2013 (until 6/22/2013)	
Wood, Andrea Cupertino, 95014-0203	6/17/2013 46% of 30 days
April 2013	
Ross, Andrea Santa Rosa, 95403-1815	4/22/2013 116% of 60 days

search for "andre" in all fields

Below the search bar, the number of hits and total number of customers, as well as the current sorting is shown. By clicking the **map** icon to the right, all customers found are displayed on the customer map (see section "Customer Map" on page 55).

If the search produces no or not the desired results, it can be repeated using the **search for ... in all fields** function. Thereby, all customer fields are examined.

saratoga EXTENDED SAVED

0 of 260 customers ordered by "Last activity" Map

search for "saratoga" in all fields

If your search returns more than 25 customers, then only the first 25 customers will be displayed initially. Click **Show all 260 ...** to display all customers.

Gómez, Kenneth Point Reyes Station, 94956	6/20/2013 18% of 60 days
Martin, Jonathan San Rafael, 94903	6/20/2013 18% of 60 days
Show all 260...	

6.2 Extended Search

Extended Search enables more advanced settings for searching and sorting.

Click the **Extended** button in the search bar.

EXTENDED SEARCH

CUSTOM FILTER

Name starts with t

PREDEFINED FILTERS

Urgency:	any	<input type="button" value="▼"/>
Last Call:	any	<input type="button" value="▼"/>
Call Note:	any	<input type="button" value="▼"/>
Schedule:	any	<input type="button" value="▼"/>
Call interval:	any	<input type="button" value="▼"/>
One-Time Call Interval:	any	<input type="button" value="▼"/>
Call duration:	any	<input type="button" value="▼"/>
Business hours:	any	<input type="button" value="▼"/>
Upcoming Holiday:	any	<input type="button" value="▼"/>

SORT

Name ascending

APPLY **CANCEL**

In **Custom Filter** you can specify which keywords (right input box) to look for in which data field (left drop-down menu), while the input box in the middle indicates how the keyword should be matched:

- **starts with:** The data has to begin with your search keyword
- **equals:** The data has to exactly match your search keyword
- **contains all:** The data has to contain all your keywords

The search function is not case sensitive.

With the "+" button a custom filter is added, with the "-" button the bottom filter is removed.

Predefined Filters are used to search for data fields that contain values and no text. The default value is **any** and means that no filter is applied to a corresponding data field. Change the values of the fields to data you want to look for.

All custom and pre-set filters are used for search. Only customers that meet **all** filter criteria, are returned in the results.

In the **Sort** section, you can specify which data field to sort after, either ascending or descending.

Start the search by clicking **Apply**. The advanced search window will be closed and the customers that match your criteria will be displayed in the customer list.

Search examples:

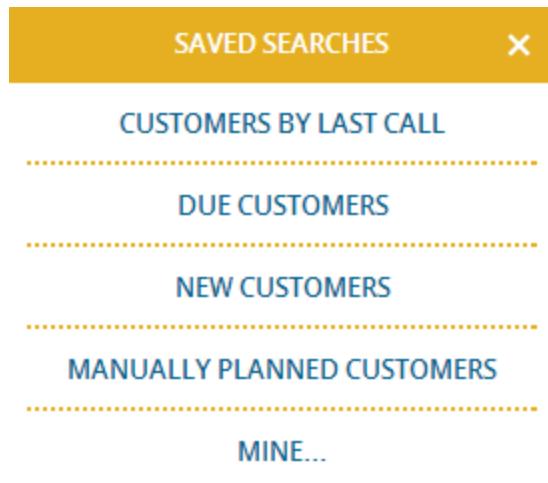
- You are looking for customers with first-name "Max":
 - **Name, contains all, Max** (custom filter)
- You are looking for customers in the ZIP code area 14xxx:
 - **ZIP, starts with, 14** (custom filter)
- You are looking for customers in Portland, that are due or overdue:
 - **City, starts with, Portland** (custom filter)
 - **Urgency, due or overdue** (predefined filter)

To edit all customers found in one step, use **Select All** and **Edit Selected**. More information on the selection mode can be found in the "Selection mode and mass editing" on page 52 section.

6.3 Saved Searches

In **Saved Searches**, you have the option to run preset queries from *portatour®* on one hand. On the other hand, you also have the option to run, save and reuse your own frequently recurring searches.

Confirm the **Saved** button in the search bar. All preset saved searches are listed. The sub-menu **Mine...** at the bottom forwards you to the management interface of your saved searches.



Continue to learn about the preset saved searches.

6.3.1 Customers by last call

Select the saved search **Customers by last call** from the customer menu to view your customers ranked by the date of the last call in descending order.

Customer Name	Last Call Date	Action
Turner, Thomas Saratoga, 95070	7/1/2013 0% of 60 days	Bring 2013 catalog Call: Ordered
Last week (6/23/2013 - 6/29/2013)		
Turner, Frank Corte Madera, 94925	m 6/27/2013 4% of 90 days	
Butler, Bobby Santa Rosa, 95401	6/27/2013 13% of 30 days	
Thomas, Scott Santa Rosa, 95401	6/27/2013 6% of 60 days	

Customers are grouped by workdays or calendar weeks – depending on how long ago the last customer call took place. Through **Show all** at the bottom of the page, you get to customers whose call is even longer ago. Bear in mind that this list is not a call protocol, because each customer appears only once on the list according to the last call date.

6.3.2 Due customers

portatour® calculates call urgency for each customer based on call interval and date of the last call. The result is divided into three classes:

- **Not due:** When the last call was within the call interval and the urgency percentage set in options has not been exceeded yet.
- **Due now:** When the last call was about as long ago as the call interval i.e. the urgency percentage has already been exceeded.
- **Overdue:** When the call interval has already been exceeded significantly.

Select the saved search **Due Customers**. The listing is sorted by call urgency (overdue first) and customer name:

overdue			
Baker, Timothy	!!	3/21/2013	
Saratoga, 95070		170% of 60 days	
Butler, Maria	!!	3/7/2013	Call: Gave sample
Oakland, 94601-2205		128% of 90 days	
Carter, Sandra	!!	5/12/2013	
Richmond, 94804		166% of 30 days	
García, Bobby	!!	3/1/2013	
Hayward, 94541		135% of 90 days	

The call urgency of a customer can be identified by the call sign displayed throughout all customer lists. "!" means "due now", "!!" means "overdue". *portatour®* prioritizes customers in the schedule according to their urgency.

6.3.3 New customers

portatour® classifies customers without set call date as New customers. You receive a list of all new customers by clicking on the saved search **New customers**. The list is sorted alphabetically:

<input style="width: 150px; height: 25px; border: 1px solid #ccc; border-radius: 5px; margin-bottom: 5px;" type="text"/> Q	EXTENDED SAVED
2 of 260 customers ordered by "Name"	 Map
B	
Bailey, Russell Oakland, 94618	*! new customer First call due
C	
Car Repair Alameda, 94609	m* new customer First call due

portatour® highlights new customers in the customer list with a "*".

6.3.4 Manually planned customers

By running the saved search **Manually Planned Customers** you will get a list of all customers not automatically included in the call schedule by *portatour®*. The customers are sorted alphabetically.

<input style="width: 150px; height: 25px; border: 1px solid #ccc; border-radius: 5px; margin-bottom: 5px;" type="text"/> Q	EXTENDED SAVED
16 of 260 customers ordered by "Name"	 Map
A	
Anderson, Kathryn Martinez, 94553	m! 4/24/2013 75% of 90 days
B	
Bennett, Jamie San Rafael, 94901-5632	m 11/14/2012 No call interval
C	
Car Repair Alameda, 94609	m* new customer First call due

A customer is to be scheduled manually, if the planning mode is switched from automatic scheduling to manual scheduling, or if business hours are not set for the customer. *portatour®* highlights customers to be scheduled manually by an "m" in the customer list. "m!!" means that the customer call is already overdue, but you have to schedule the customer yourself. Create an appointment with the customer (see section "Create appointment" on page 82) or include the customer using a reservation (see sections "Include customer in schedule" on page 33 und "Include in schedule" on page 67).

6.3.5 My saved searches

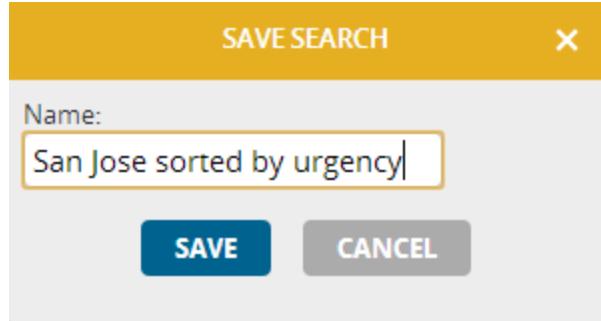
Saved searches are useful for customer categorization, e.g. by postcode, region, industry, importance. We recommend to save frequently repeated searched in **My Saved Searches**.

First, run an **Extended Search** that meets your expectations. Then, click **Saved** in the search bar and select the sub-menu **Mine....**

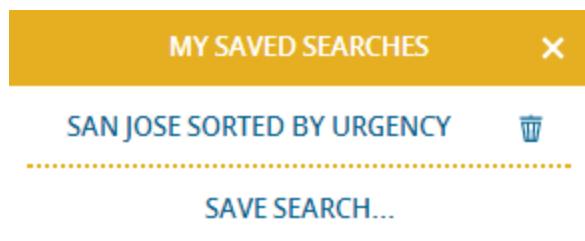
A list of saved searches will be displayed. Initially, this list is empty.



Click **Save Search** and enter a name for the saved search. Then, click **Save**.



To load and run a saved search at a later point in time, click **Saved** in the search bar and then **Mine....**. Select the search from the list of your saved searches.



To delete a saved search, click in **My Saved Searches** on the recycle bin icon to the right of the search that is to be deleted.

If you want to change your own saved search, load the search first. Remember the name of this search (e.g. "All Glengarry Leads, by call urgency"). First, make your desired changes in **Extended Search**, then go to **Saved, Mine..., Save Search....**. Enter the **name** of the search that is to be updated (e.g. "All Glengarry Leads, by call urgency").

6.4 Alphabetical Index

Customers can be found quickly by paging through the alphabetical index. First, click **ABC** in the customers menu, and then on the first letter of the customer name. A list is shown with all customer names starting with that letter. The list is sorted in alphabetical order:

25 of 260 customers
ordered by "Name"

Map

Campbell, Brett San Jose, 95127-1612	!	4/16/2013 84% of 90 days
Car Repair Alameda, 94609	m*	new customer First call due
Carter, Aaron Cupertino, 95014-4055	m	7/18/2012 No call interval

6.5 Columns in customer lists

Depending on screen- or window width, the customer list is displayed in two, three or four columns. The first two columns are always visible.

- Column 1 shows the customer name, including ZIP code and city.
- Column 2 contains an icon for the call status (see next section).
- Column 3 shows the date of the last call or "New Customer" for customers that have not been called yet, including due date as a percentage of the call interval and the call interval. For customers without call interval, "no call interval" is displayed.
- In the 4th column, if available, the call note and report of the last call are shown.

6.6 Icons in customer lists

As mentioned in the previous sections, you can find symbols in the second column of customer lists. They help you identifying the "call status" of each customer at a glance. The symbols are:

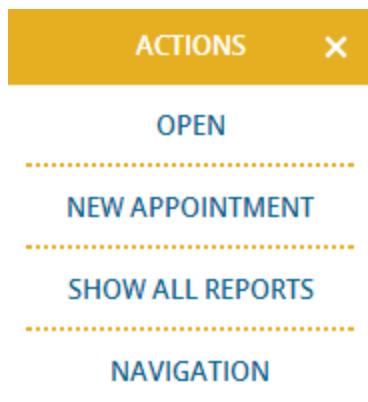
- A** For this customer there is a manually created appointment in the calendar.
- *** This is a new customer because no "last call" has been entered yet.
- m** This customer is to be scheduled manually (appointment/reservation).
- !** A call would be due now according to the call interval of this customer.
- !!** A call is already overdue according to the call interval of this customer.

These symbols can also be displayed in combination, e.g. **mT!!** for a customer that needs to be scheduled manually, whose call is has been overdue according to call interval, but the appointment has already been added to your calendar.

For customers without a symbol displayed none of the circumstances described above apply. A call according to call interval is not necessary either.

6.7 Context menu for customers list

Common actions for customers are directly accessible in the customer list through the context menu. The context menu can be opened by right-clicking the customer with the mouse on desktop PCs, or by tapping the customer for about 1 second on touchscreen devices.



With **Open** you get to the detail page of the customer (see section "Customer detail page" on page 58).

New Appointment opens a window to create a new appointment for this customer (see section "Appointment with customer reference" on page 82).

Show all reports shows a list with all past reports for this customer (see section "Last Report" on page 69).

Navigation launches the navigation program of your device with the address of the selected customer (see section "Navigation" on page 61).

All actions can also be accessed via the customer detail page (see section "Customer detail page" on page 58).

6.8 Selection mode and mass editing

The selection mode enables you to select several customers and subsequently edit them at once.

Below the customer list you will find the function **Enable selection**:

Carter, Aaron Cupertino, 95014-4055	m 7/18/2012 No call interval	update email and telephone contacts
Turner, Thomas Saratoga, 95070	7/1/2013 0% of 60 days	Bring 2013 catalog Call: Ordered
ENABLE SELECTION		

By confirming **Enable Selection**, a button appears next to each customer by which you can select and deselect the customer.

<input checked="" type="checkbox"/>	Carter, Aaron Cupertino, 95014-4055	m 7/18/2012 No call interval	update email and telephone contacts
<input checked="" type="checkbox"/>	Turner, Thomas Saratoga, 95070	7/1/2013 0% of 60 days	Bring 2013 catalog Call: Ordered
	DISABLE SELECTION	SELECT ALL	CLEAR SELECTION

To select all customers on the list at once, click **Select All**. Similarly, **Clear Selection** removes all existing selections. **Disable Selection** removes all selections and exits the selection mode.

Select **Edit Selected** to edit the selected customers. You get to following page:

The screenshot shows a software interface for managing selected customers. At the top, there's a navigation bar with icons for back, forward, and search, followed by tabs for SCHEDULE, CUSTOMERS (which is currently selected), and APPOINTMENTS. Below the navigation bar, the text "Edit 3 selected customers" is displayed. The main area is divided into three sections: "RESERVATION", "CALL PARAMETERS", and "OTHER".

- RESERVATION:** Contains buttons for "NO RESERVATIONS" (selected), "INCLUDE IN SCHEDULE", and "EXCLUDE FROM SCHEDULE".
- CALL PARAMETERS:** Contains buttons for "EDIT PLANNING PARAMETERS...", "EDIT HOLIDAYS...", and "EDIT OPENING HOURS...".
- OTHER:** Contains a "DELETE" button and a "EDIT CUSTOM PROPERTIES..." button.

You will find the number of selected customers in the row below the navigation bar.

For selected customers mass editing allows...

- Including in or excluding from the schedule (see also section "Include customer in schedule" on page 33 and "Include in schedule" on page 67)
- Editing planning parameter and holidays (analogous to section "Scheduling parameters" on page 71)
- Editing business hours (analogous to section "Business hours" on page 73)
- Editing custom fields (analogous to section "Additional customer fields" on page 68)
- Deleting of customers

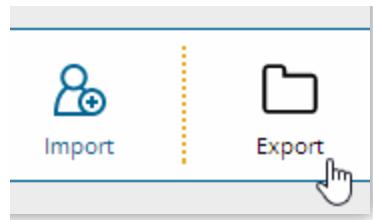
Click the desired function.

6.9 Create customers

Below the navigation bar, next to the sub-menu **Search** and **ABC**, you will find the function **New customer**, which enables you to create a new customer (see "Create customers" on page 75).

6.10 Export customers

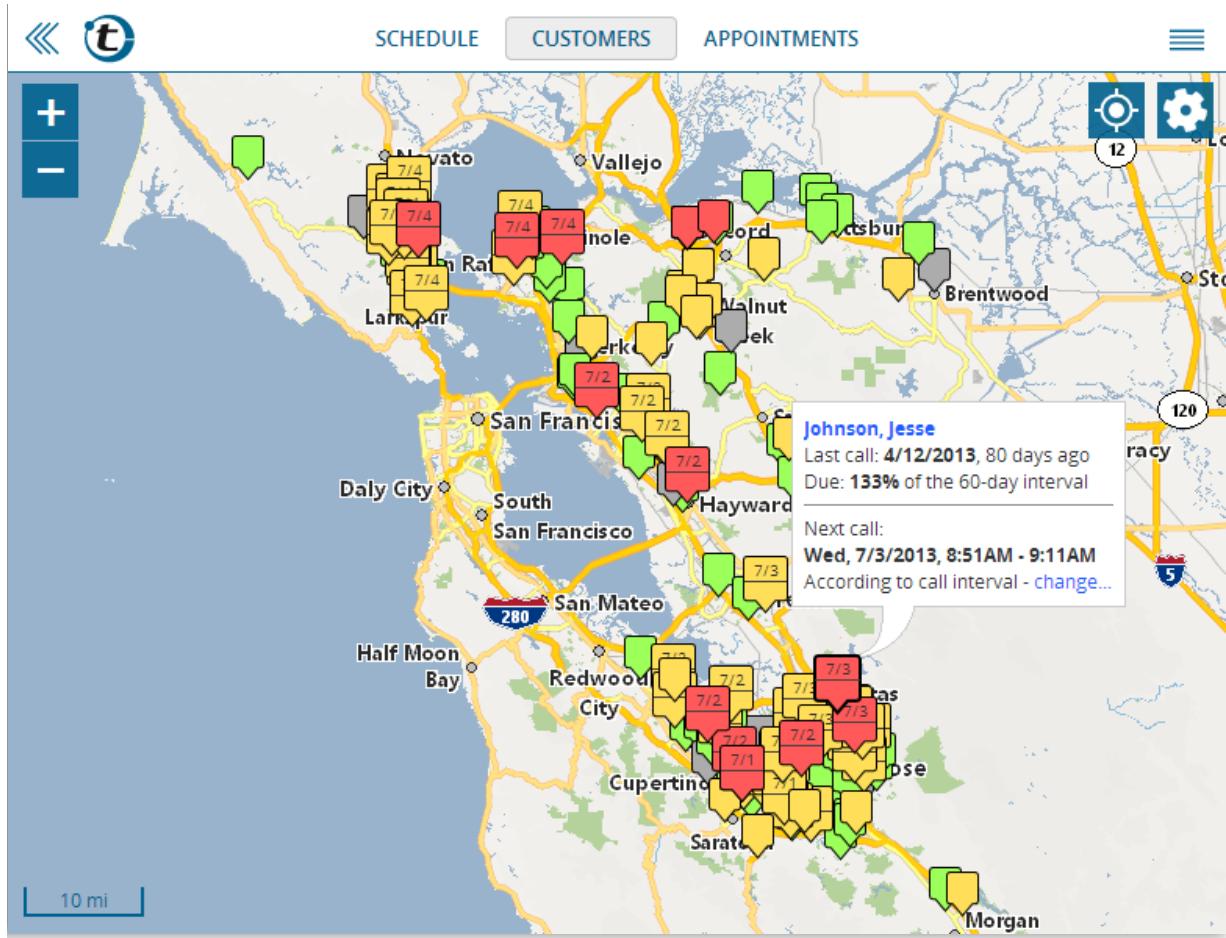
You will find the **Export** button below the customer list, which enables you to export all customers. This triggers downloading an export file.



This way, you can import or mass edit your customer data in another program. In case you import mass-edited data, *portatour®* includes a second worksheet in exported Excel- and Open Document file, where the field assignments are stored. After mass-editing, you import this file in order to update your customer data (see section "Update customers" on page 25). The **Portatour ID** column serves as unique key for re-importing. Therefore, do not delete or edit this column.

7. Customer Map

Clicking **Map** on the customer list you get to the map view that displays your customers and the current schedule. If you use *portatour® Anywhere* on the road, note that this dynamic map view requires a powerful smartphone with large touchscreen and at least 3G internet connection.



You can move the map by moving your finger on the touch screen or dragging the mouse. You can zoom towards a spot on the map by double clicking it. Alternatively you can use the two zoom buttons on the top left of the map.

The markers show the customers that need to be called while the color indicates the due date (red = overdue yellow = due now green = not due grey = no call interval).

When clicking on a customer marker, an info-bubble appears, displaying summary information of the customer. By clicking again or clicking on a different spot on the map, the info-bubble closes. Clicking on the customer-name-link will open the customer detail page (see section "Customer detail page" on page 58).

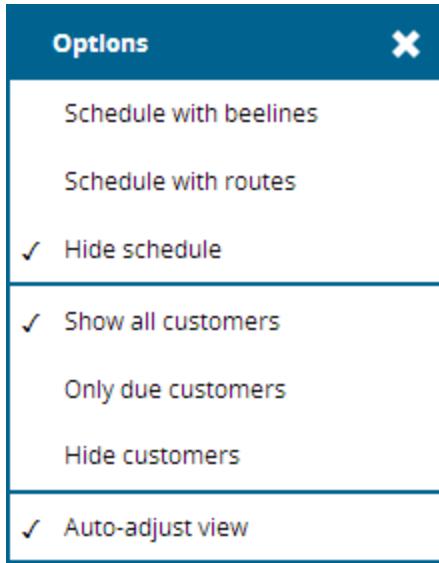
You can recognize whether the customer is already included in the current schedule, first by the enlarged marker containing the date in the top row, second by the call being shown in the info-bubble. By clicking **change...** you can edit the reservation status of the customer – for more details, see section

"Edit schedule" on page 33. The current reservation status is shown as abbreviation in the second row of the marker.

Hint: If several customers have the same address and therefore the markers would lie on top of each other on the map – e.g. two contacts in the same building – *portatour*® thus staggers the markers a few meters apart on the map. Therefore, the position no longer corresponds to the exact geographical location, but all markers are visible and clickable.

7.1 Options

On the top right of the map you can open the option menu by clicking on the blue icon:



7.1.1 Schedule

In the first section you can select whether or how you want the schedule to be displayed on the map.

The map displays the drives on the selected day, either in **beelines** or in **routes** which are visualized as blue trace. The calculation of the exact route for the whole schedule happens on the *portatour*® Server and takes around 2 to 10 seconds, depending on route distance and server capacity.

For customers who are scheduled on the currently selected day the marker displays call time instead of call date.

More information on the schedule map view can be found in section "Map" on page 31.

7.1.2 Customers

In the second section you can select whether or which customers you want to be displayed on the map.

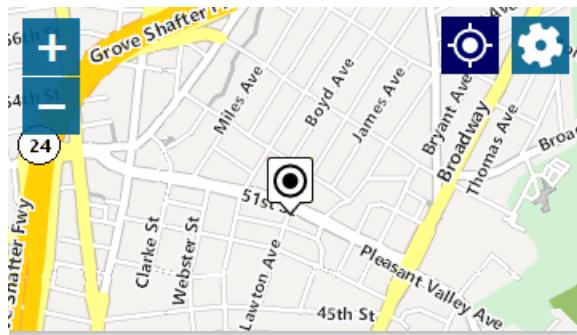
With **Only due customers** you limit the display to those customers who are due or already overdue according to the call interval (e.g yellow and red markers).

7.1.3 Auto-adjust view

portatour® automatically adjusts the map view and zoom level by default, so that the desired customers or routes are in the display area. You will notice this when switching between days in the schedule. In some cases it can be helpful that *portatour*® does not automatically change the map view you set up. Untick **Auto-adjust view** to keep your configured view. In the footer of the map, you will subsequently have a button to zoom on the currently selected customer or route.

7.2 Location

If your smartphone or tablet has a compatible GPS module, a location button will be displayed on the top right of the map. Activate by clicking this button in order to view your current location as a black-&white icon on the map:



Before using your location, you will be asked by your smartphone or tablet whether you grant *portatour*® access to your location data. Answer this question with Yes. Note that the location determination may take a few seconds, depending on the availability of a GPS signal.

The location marker remains active until you click again on the location button to deactivate it or leave the map page.

8. Customer detail page

The detail view of individual **Customers** is split into several sections:

The screenshot shows the 'CUSTOMERS' tab selected in the top navigation bar. The main content area is divided into several sections:

- ADDRESS**: Displays the address "Turner, Thomas" and "19600 Via Escuela, Saratoga, CA 95070". Buttons for "Show map", "Navigation", and "Surrounding customers" are present.
- LAST CALL**: Shows a call made on "Sun, 04/28/2013 13:44PM" with status "Called now". Another entry for "Missed" is shown.
- LAST REPORT**: A button to "New report" is available.
- SCHEDULING PARAMETERS**: Set to "Automatically". Configuration includes "Interval: 60 days", "Duration: 20 min", and "Holiday from" and "Holiday until" fields.
- BUSINESS HOURS**: Details working hours from Monday to Saturday.
- INFORMATION**: Lists "Customer n.: 211", "Phone: 555-4669747", "Email: thomas@example.com", and "Employees#: 15".
- MY PLACES**: States "Not in 'My Places'".
- NEXT CALL**: Predicted based on the schedule: "According to call interval of 60 days" on "Mon, 07/01/2013, 09:33 AM - 09:53 AM". Includes a "Call Note: -" field and a "Include in schedule" button.
- UPCOMING APPOINTMENTS**: Shows an appointment on "Mon, 07/01/2013, 9:30 AM-10:00 AM, 20 min". A "New appointment" button is available.
- DELETE**: A button to remove the customer record.

8.1 Customer address

This section displays the customer's name and address:

Turner, Thomas
19600 Via Escuela
Saratoga, CA 95070

Below the address are three buttons: "Show map", "Navigation", and "Surrounding customers".

At the beginning of the customer detail page the name of the customer is presented together with the address.

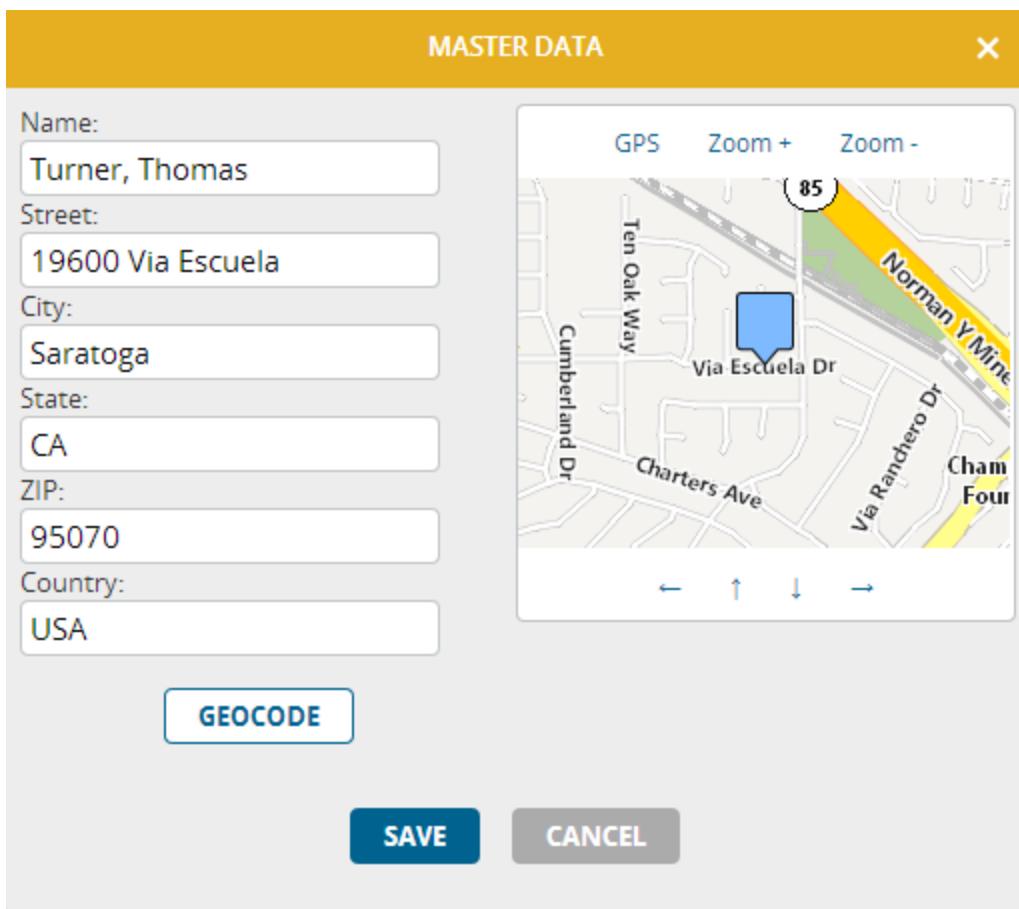
After importing the addresses, they are automatically geo-coded, i.e. precisely located on the map. This positioning is a prerequisite for sales-route planning. Some problems may arise in course of geo-positioning, which are shown below the address:

Geocoding possibly inaccurate or Geocoding failed

Optionally, you can edit the address of the customer by clicking the icon and geo-locate the address manually. See the following sections "Edit address" below or "Geo-Location" on page 100.

8.2 Edit address

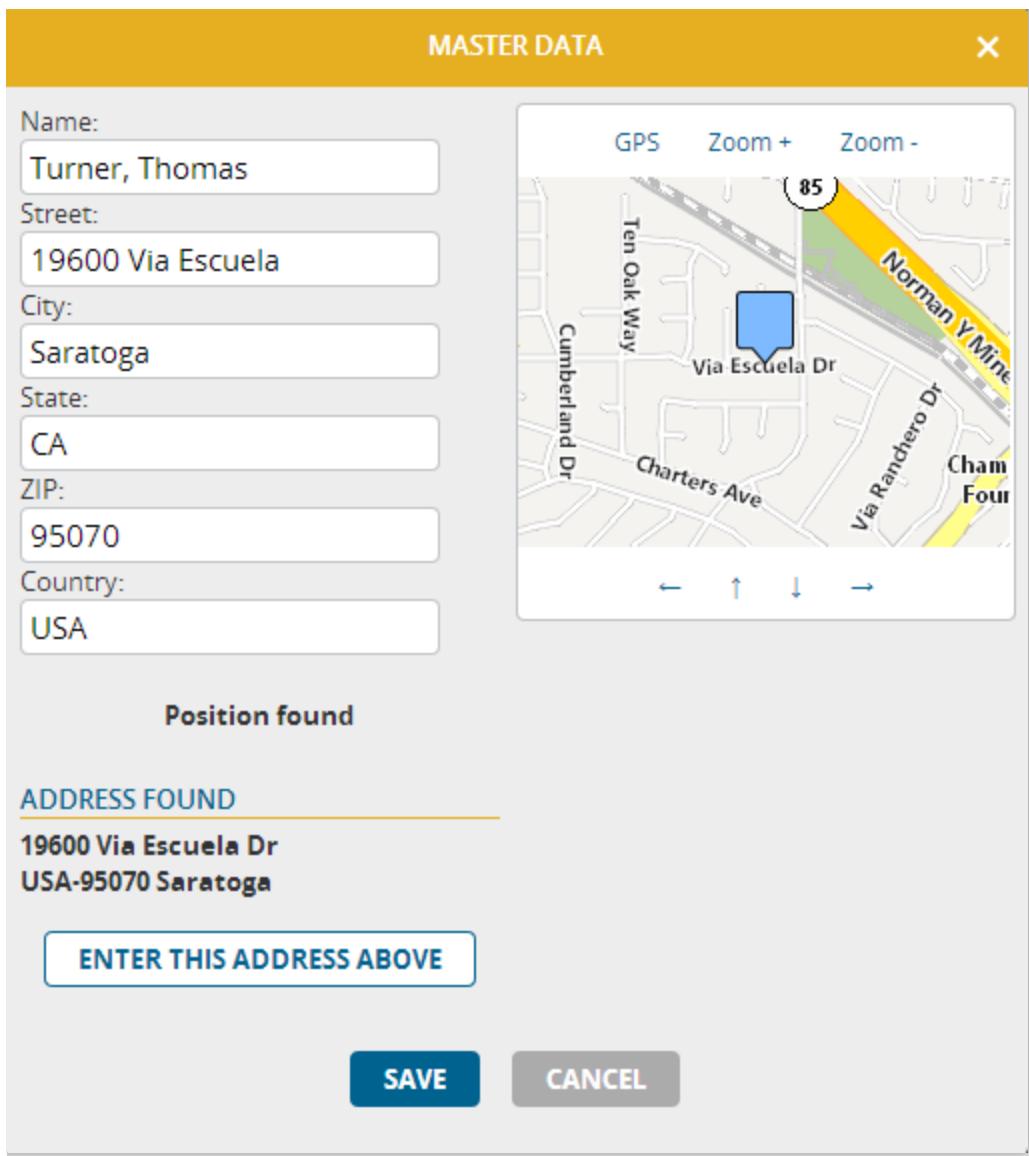
By clicking the edit icon in the address you open a form, in which you can change the master data of your customer consisting of name, address and geo-location.



Make the changes in the respective input box and click **Save**.

Pay attention to following points when editing:

- Setting the **country** is only necessary if it is different from your home country.
- Remember to click **Geocode** after editing the address. Only then the new address will be geo-located and the exact location of the address is available for sales-route planning. For information regarding geo-positioning and potential error messages, see section "Geo-coding" on page 101.

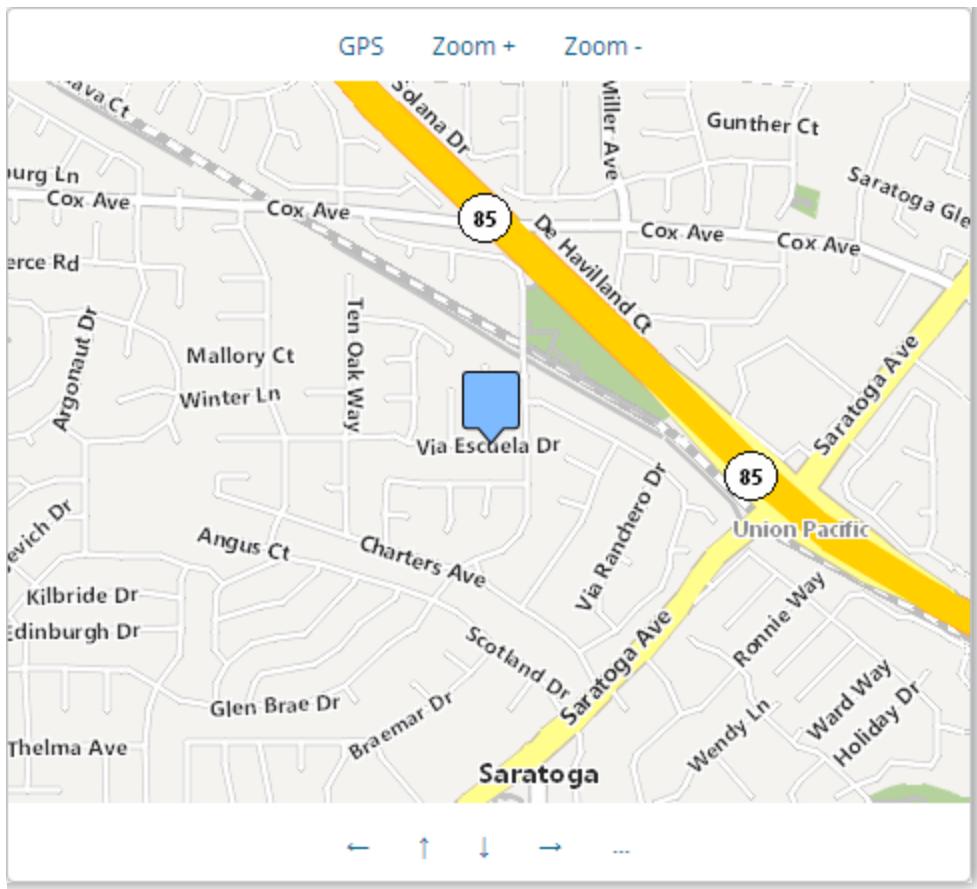


You can optionally set the position manually on the map (see section "Set geo-location manually" on page 103) or by using the GPS function to determine the location (see section "Determine GPS location" on page 104).

Click **Save** to save the new address, including the geo-location of the customer.

8.3 Map

Click **Show map** in the **Address** section opens the map view, the customer is shown in the center as a blue marker:



You can change the map scale with the two **Zoom**-buttons above the map. With the four **arrow** buttons below the map, you can move the map to the respective direction.

Alternatively you can move the map by clicking near the borders. The map view center shifts towards the area you have clicked upon.

On touch screen devices such as mobile phones or tablets, you can move the map by sliding with your finger or a pen. On a desktop PC, you can move the map by dragging the mouse. Double tapping or double clicking will zoom towards the respective zone.

You can switch to the extended map which includes all customers by clicking on the button [...].

8.4 Navigation

By clicking the link **Navigation** in the **Address** section, the GPS navigation program on your smartphone will be launched, using the customer address as target destination. To configure which program is opened by portatour®, refer to section "GPS Navigation" on page 96.

8.5 Surrounding customers

The link **Surrounding customers** in section **Address** opens a list of the 20 closest customers surrounding this customer. The ranking is based on the distance of customers in beelines, starting with the closest customers:



SCHEDULE

CUSTOMERS

APPOINTMENTS



All surrounding customers



Open now



Open and due now

20 surrounding customers
for Turner, Thomas



Map

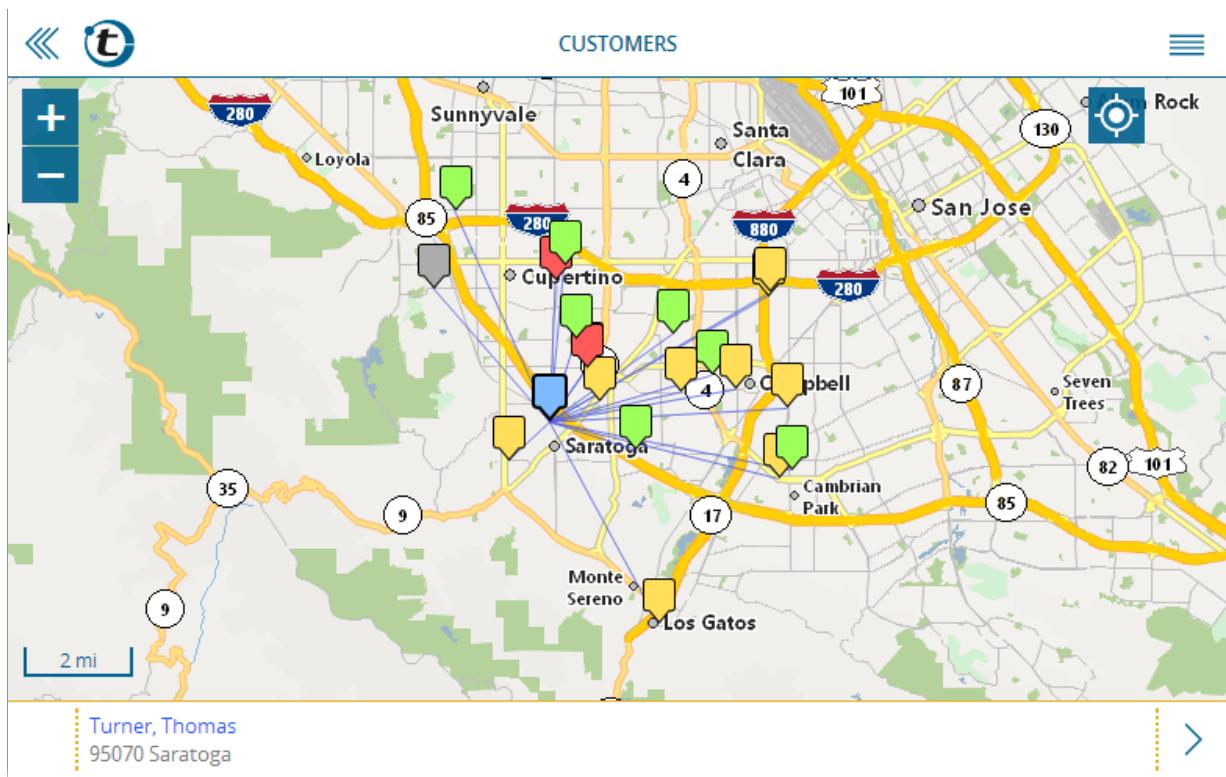
Anderson, Russell Saratoga, 95070	!	6/5/2013 86% of 30 days
Jenkins, Johnny Saratoga, 95070-4950	!	4/23/2013 76% of 90 days
Baker, Timothy Saratoga, 95070	!!	3/21/2013 170% of 60 days
Morgan, Adam Saratoga, 95070-3435	!!	4/12/2013 133% of 60 days

You can use this function, for example, if there is time to squeeze in a call prior to your next fixed call. You can recognize the call urgency through the exclamation points. In case your customers have limited or varied business hours, the option **Open now** is recommendable, because it filters out customers that can be called at the current point in time. If you want to further restrict the customer selection, click **Open and due now** in order to show the customers that are due or overdue from all the customers that can be called now.

8.5.1 Map of surrounding customers

Right above the list you will find a link to the surrounding customer **Map**. This will open a map view, where the 20 surrounding customers from the list will be shown geographically.

Please note that the dynamic map view requires a powerful smartphone with a high-resolution touch-screen and at least 3G internet connection.



The current customer is represented by a blue marker. The colors of surrounding customers indicate their call urgency (red = overdue, yellow = due now, green = not due, gray = no call interval).

You can move the map by moving your finger on the touch screen or dragging the mouse. You can zoom towards a spot on the map by double clicking it. Alternatively you can use the two zoom buttons on the top left of the map.

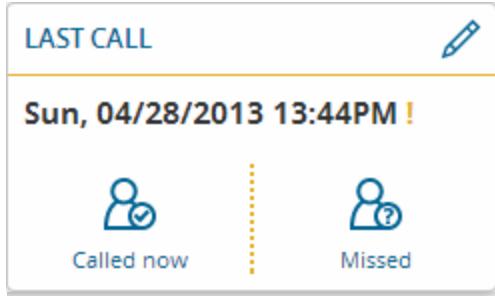
The footer displays the currently selected customer, which is also highlighted in dark blue on the map. With the arrow keys "<" and ">" you can switch to the customers that are closer or further away, according to beelines (depicted as light blue line on the map).

A click on the customer name in the footer or a click on the customer marker opens an info- bubble of this customer. If you click on the customer name a detail view of the customer appears.

With the back function in your browser or the <<< button in the navigation bar, you return to the list of surrounding customers.

8.6 Last Call

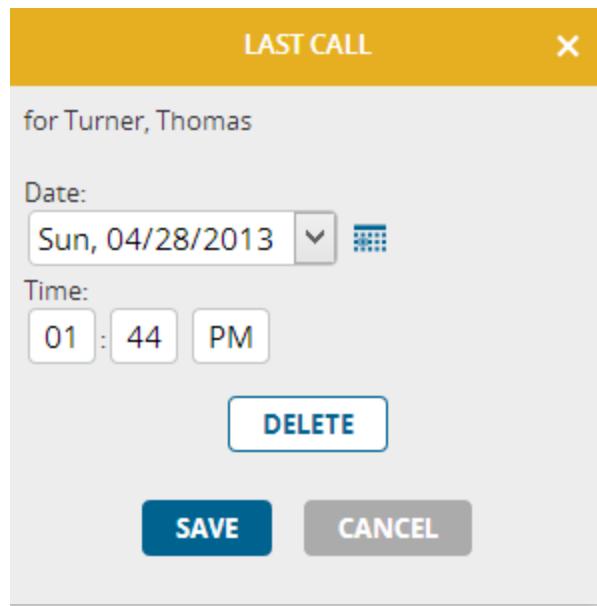
In this section you find the date and time of the last customer call. The current call urgency will be displayed through exclamation points:



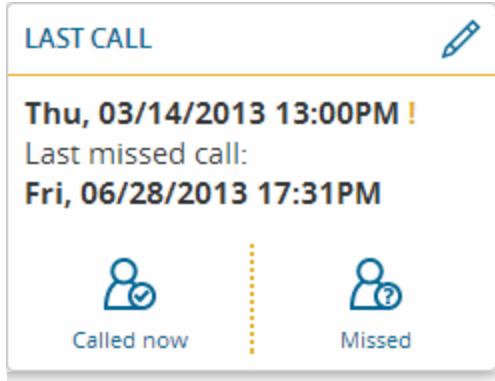
Click on **Called Now** to log a call. Through this, the current date and time will be set as last call date. Additionally, a check-mark shown next to the customer in the schedule indicates that you already called this customer.

We recommend logging your calls timely – ideally immediately after the customer call. Hence you ensure accurate call documentation and lay a good foundation for the calculation of future schedules.

If you want to enter or mend the date of the last call at a later point in time, click the edit icon on the top right. You get to an input form where you can freely choose and **Save** the date and time of the last call. If the desired date is not shown in the dropdown menu, you can open the calendar view by clicking the calendar icon, selecting the desired month with << and >>, and clicking the day to determine the date of the last call. With **Delete** you remove the date of the last call.



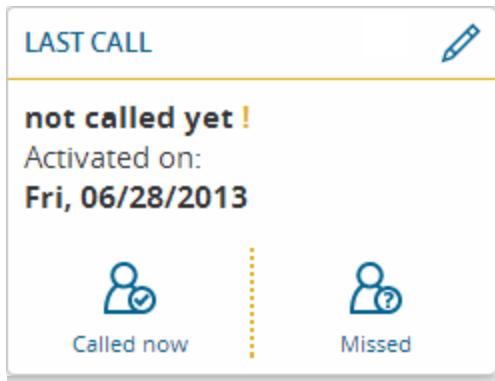
If a customer has been missed, let *portatour*® know by clicking the button **Missed now**. Through this, you make sure that *portatour*® does not reschedule the customer for the same day. By updating the schedule now, *portatour*® can schedule additional calls to invest the time well.



The date of the last missed call will be displayed on the customer detail page for as long as a successful call will replace it.

8.6.1 New customers

For new customers – i.e. customers not called yet – you will find the additional note **Activated on:**



The date the customer has been created or activated for *portatour*® is displayed as activation date by default. This date is used to calculate the call urgency of new customers. From the activation date on, *portatour*® calculates an optimized schedule for the new customer.

For example, a new customer that has been activated for *portatour*® on the 06/01/2012 with a call interval of 60 days will usually be scheduled between 06/01/2012 and 07/30/2012 at the latest.

The actual day for the first call will be selected by *portatour*® according to an optimized schedule – which depends on the geographical location of the customer and the call urgency of existing customers. After the initial call, future calls will be scheduled based on the date of the last call and the call interval. The indication **Activated on** will be hidden because it is no longer relevant to call urgency.

You can change this date with > **Change Activation Date**.

Hint: If you set the date in the future, then scheduling the initial call will start from this date onwards, at the earliest. If you set the activation date in the past you generate higher call urgency for this new customer thereby scheduling an earlier first call.

8.7 Enter call report

Depending on the settings in **Options > Call Parameters > Reporting > Call reports** by clicking **Called now** or **Missed**, you will be prompted to enter the call report:

REPORT

X

for Turner, Thomas

Date:

Start time:

End Time:

Subject:

Note:

Call Note:

SAVE **CANCEL**

Date, **Start time**, **End time**, and **Subject** are pre-filled automatically. Adjust them if necessary. Use the **Note** input box to enter a note of up to 255 characters. In the **Call Note** field, you can add important tasks that you would like to consider for the next call. The **X** button deletes this note.

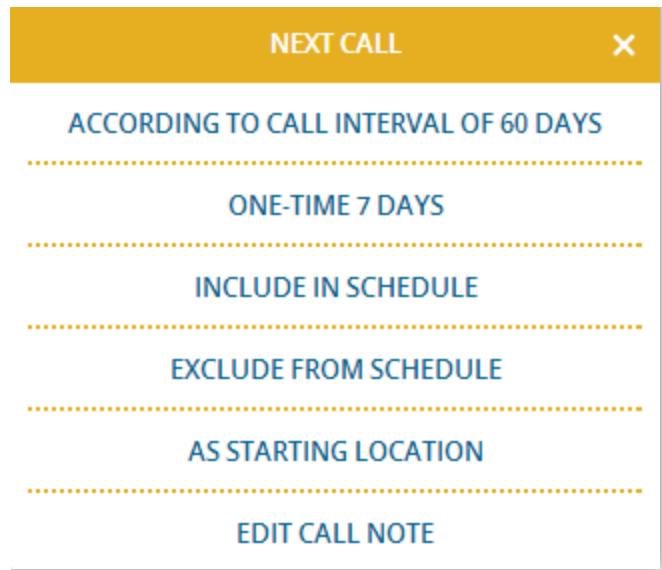
Click **Save** to save the call report and is available for later review in the customer detail page at **Last Report**.

8.8 Next call

In this section you can see when the customer should be called the next time , as well as a brief reminder (**Call note**) about important tasks that you would want to consider during the next call.



By clicking the edit symbol , following menu will be shown:



Through the last point in this menu, **Edit Call Note**, the call note can be changed. The remaining options let *portatour*® know when to call the customer next. *portatour*® includes your changes as soon as the schedule has been updated.

8.8.1 Automatic / Manual

The first row displays the current **scheduling parameters** – see section "Scheduling parameters" on page 71. There are following options:

- **According to call interval of X days:** *portatour*® automatically schedules the customer to reach a call interval every X days.
- **Manually every X days:** You schedule the customer manually a reminder is shown every X days.
- **Manually no call interval:** If necessary schedule the customer manually.
- **Manually no business hours:** manually create an appointment if needed, no regular business hours have been entered for the customer.

To adapt scheduling you have a range of reservation options listed below as well as the possibility of creating an appointment.

8.8.2 One-time 7 Days / 14 Days

Use this option if you want to schedule a one-time customer call within a short interval (about 7 days or 14 days). For example if you agree to call a customer outside of your schedule and within the next week because a major event is coming up without having scheduled a fixed appointment.

8.8.3 Include in schedule

If you want to include the customer immediately into your schedule, add a reservation through this option. Use it for customers who are scheduled manually or if you want to call customers prior to the scheduled call interval (see section "Edit schedule" on page 33).

8.8.4 Exclude from schedule

Use this reservation option if you do not want to call customers (yet), despite them being set to automatic scheduling. The customer is excluded from automatic scheduling until you remove the reservation (see section "Edit schedule" on page 33).

8.8.5 As starting location

Select this option if you want to use the customer location as departure point for your sales-route.

8.8.6 Edit call note

Here, you can enter the call note that should be displayed on the customer detail page under **Next Call**. To keep it in mind, this notice is also shown just below the customer (see section "Display" on page 29).

8.9 Upcoming appointments

This section tells you about upcoming appointments with this customer.



Each appointment is listed with weekday, date, start time and duration. The start time can also be a period of time if the appointment has a leeway or a time frame. By clicking on the appointment, a detail view of the appointment will be opened, where it can be edited.

You can create a new appointment for this customer by selecting **New appointment**. More information can be found in section "Appointments" on page 78.

8.10 Additional customer fields

In the **Information** section, optional data fields of the customer are displayed. The actual fields will differ from the following example.

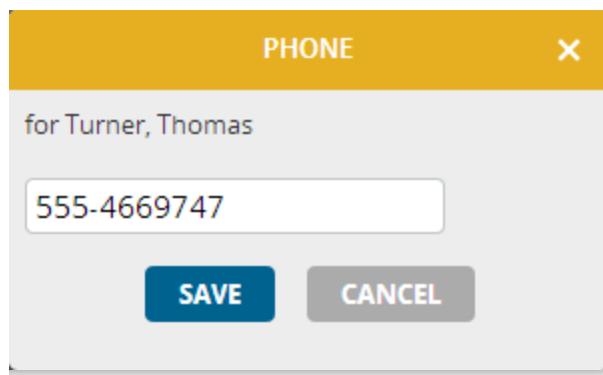
INFORMATION

Customer n.: **211**
Phone: **555-4669747**
Email: **thomas@example.com**
URL: **www.example.com**
Note: **Talk about discounts.**
Employees#: **15**



A click on a phone number is enough to establish a telephone connection-without any further input. A click on an email address creates a new email, a click on a website opens the browser.

To edit the fields, click the edit icon  and select the field that is to edit. A separate editing window will open:



Edit the value and click Apply to save the change.

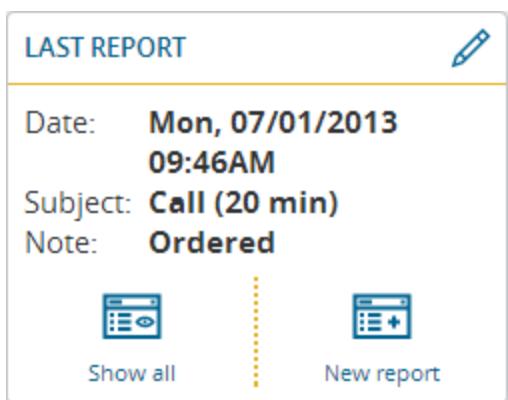
8.11 Last Report

The **Last report** section contains call reports and manually created Log entries from the past. On the customer detail page, the **Last Report** is displayed with date, subject, duration and note:

LAST REPORT

Date: **Mon, 07/01/2013
09:46AM**
Subject: **Call (20 min)**
Note: **Ordered**

 Show all  New report



To list more historical activities, click **Show all**. The most recent entry is shown at the top:



SCHEDULE

CUSTOMERS

APPOINTMENTS



All reports for Turner, Thomas

FRI, 06/28/2013

**03:30 PM , Phone (25 min)**

Asked if sample was satisfying. OK! confirmed meeting next week,

WED, 04/24/2013

**02:00 PM , Call (20 min)**

Gave sample

MON, 02/11/2013

**10:20 AM , Call (16 min)**

Gave new catalogue

The list displays entries not older than one year.

8.11.1 Create or edit call report

Call reports are primarily created when clicking **Called now**. To log further activities (e.g. phone calls), click **New Report**. A form appears. Enter the type of activity in the **Subject** field. The same form appears, if you edit or delete an existing call report. Click on next to the call report (see picture above).

REPORT

for Turner, Thomas

Date:

Start time:

End Time:

Subject:

Note:
Asked if sample was satisfying. OK!
confirmed meeting next week,

Press **Save** to save the new entry or modifications to an existing entry. Press **Delete** and the entry will be irrevocably deleted.

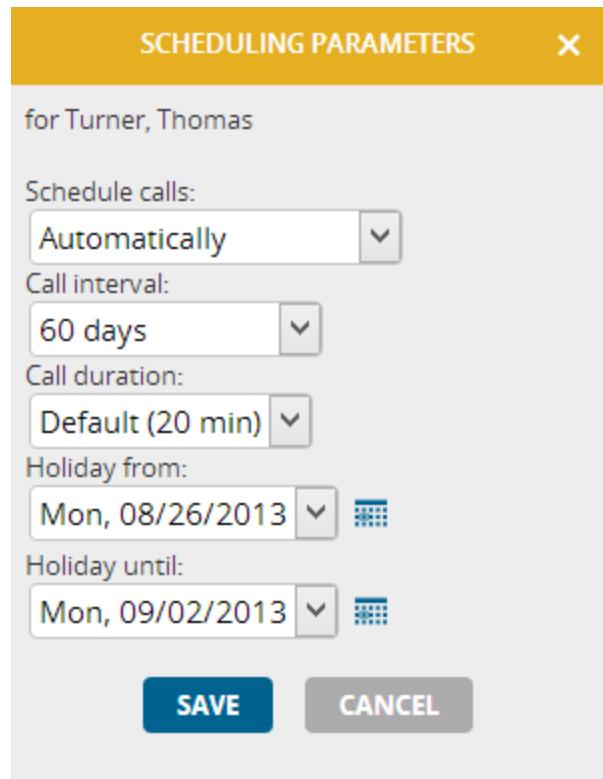
8.12 Scheduling parameters

In the **Scheduling parameters** section you can determine whether and how customers are taken into account by *portatour*® during scheduling by default. These apply if you do not add reservations as described above in **Next Call** or **New Appointment**.

SCHEDULING PARAMETERS

Schedule:	Automatically
Interval:	60 days
Duration:	20 min
Holiday from:	Mon, 08/26/2013
Holiday until:	Mon, 09/02/2013

These parameters can be changed in *portatour*® Anywhere by clicking on the edit-icon  . The edit page will appear:



If you want to apply the default *portatour*® Options (see section "Scheduling parameters of customers" on page 91) for this customer, select **Default** from the Options drop-down menu.

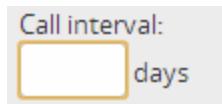
8.12.1 Schedule Calls Automatically / Manually

Customers can be **Automatically** scheduled by *portatour*® according to call urgency. Call urgency is determined by the period between the last call and the current date, and in turn compared with the call interval specified.

If the schedule is set to **Manually**, customers will only be scheduled, if customer appointments have been created (see section "Upcoming appointments" on page 68) or if customers are included by reservation in the schedule (see section "Include customer in schedule" on page 33 or "Include in schedule" on page 67).

8.12.2 Call interval

You can specify customer call frequency by using the call interval in days. You can either select one of the intervals suggested in the drop-down menu or enter a value between 7 and 730 days (between weekly and 2-yearly). If you cannot find your desired interval, select **Custom** at the bottom of the drop-down menu. Now, you can manually enter the interval in days.



If you do not want to call your customers regularly, but consider calling customers only when necessary, set call interval to **None**. Use reservations or appointments to include customers for scheduling.

If the administrator of your host system provides automatically calculated call intervals – e.g. according to the sales performance of customers – switch to **calculated** to use them.

8.12.3 Call duration

Here you can select the estimated duration of a call at this customer. Use Custom input analogous to call interval. The value must be between 10 and 480 minutes. Besides the duration of the customer dialogue call duration should also include the duration of finding a parking space call preparation walking distance from the car to the customer any registration and deregistration formalities and delays.

8.12.4 Holiday from/until

Here, you can enter the next vacation period of the customer. Despite any configured call urgency, *portatour*® does not schedule any calls during this period. You can either use the drop-down menu to select a date in the next 30 days, or select from a scrollable calendar view through the **Calendar** link, where you can select a date which lies further ahead in the future. To delete the vacation, select the top entry (=empty) from each of the two drop-down menus.

Press **Save** to save your changes, which will be included immediately upon the next schedule calculation.

8.13 Business hours

Customer **Business Hours** are the times of the day when you can visit the customer for a call.

BUSINESS HOURS	
Sunday:	-
Monday:	9:00 AM - 5:00 PM
Tuesday:	9:00 AM - 5:00 PM
Wednesday:	2:00 AM - 5:00 AM 9:00 AM - 1:00 PM P
Thursday:	9:00 AM - 5:00 PM
Friday:	9:00 AM - 6:00 PM
Saturday:	-

Preferred business hours are highlighted with a P. To edit, right click the edit icon  . Following page will open:

X

for Brown, Ryan

USE DEFAULT **CUSTOM OPENING HOURS**

Sunday:

: :	-	: :	-	: :
: :	-	: :	-	: :

Monday:

09	:	00	AM	-	05	:	00	PM
:	:			-	:	:		

Tuesday:

09	:	00	AM	-	05	:	00	PM
:	:			-	:	:		

Wednesday:

02	:	00	AM	-	05	:	00	AM
09	:	00	AM	-	01	:	00	PM

Thursday:

09	:	00	AM	-	05	:	00	PM
:	:			-	:	:		

Friday:

09	:	00	AM	-	06	:	00	PM
:	:			-	:	:		

Saturday:

: :	-	: :	-	: :
: :	-	: :	-	: :

Preferred openings

SAVE **CANCEL**

There are two business hour intervals for each day of the week. To enter a time select hours from the first drop-down menu and minutes from the second drop-down menu. For rapid deletion of a call interval select the top entry (= empty) in the hour drop-down menu.

Press **Save** to save your changes, which will be included immediately upon the next schedule update.

Customers without business hours cannot be scheduled automatically by *portatour*®.

To reset the business hours of this customer to the default business hours set in Options (see section "Business Hours of customers" on page 93), click **Use default**.

8.13.1 Hints on handling business hours

portatour® scheduling cares that the start of the call is within the business hours provided. Calls can last longer than business hours. Thus, it can be helpful to enter time slots shorter than the configured call duration. If, for example, you can only have a customer call when you are on site at 9 o'clock, enter 08:55-09:00 as business hours, despite the call duration being one hour.

Business hours have no effect on manually created customer calls. I.e. if the call is outside of business hours, the call will still be scheduled by *portatour®* at the given time.

8.13.2 Preferred calling times

If you prefer visiting the customer on certain days or at certain times, click on **Preferred openings**. A checkbox appears next to the business hours area, mark the preferred times with it.

Friday:

09	:	00	AM	-	01	:	00	PM	<input type="checkbox"/>
02	:	00	PM	-	04	:	00	AM	<input checked="" type="checkbox"/>

Saturday:

		-			<input type="checkbox"/>
		-			<input type="checkbox"/>

Check mark shows preferred openings

SAVE **CANCEL**

Preferred openings cause *portatour®* to preferably schedule the customer within this time frame. Beware that under certain circumstances this may cause slightly longer travel times. In case the detour is too long or the customer is not available within the preferred business hours due to conflicting appointments, *portatour®* will fall back to the non-preferred business hours.

In terms of travel optimization we recommend to deal economically with the preferred call timestamps and use them only for important reasons. If you want to use preferred business hours for a customer then you better highlight several time frames rather than just one.

8.14 Create customers

In the navigation bar, go to the customer list and click on the **New customer** button:



The input from will be shown with the Master Data of the new customer:

NEW CUSTOMER

Name:

Street:

City:

State:

ZIP:

Country:

GPS Zoom + Zoom -

← ↑ ↓ →

GEOCODE

SAVE
CANCEL

Entering the address and geo-coding is analogous to editing an existing customer - see section "Edit address" on page 59.

Depending on the configuration of custom fields of customers (see section "Additional customer fields" on page 68), the input form may be extended by further sections. You can provide this additional information yourself.

INFORMATION

Customer n.	<input type="text"/>
Mobile	<input type="text"/>
Email	<input type="text"/>
URL	<input type="text"/>
Note	<input type="text"/>

Setting mandatory fields may be necessary prior to saving a new customer.

After **Saving** the entry, the new customer is created in the *portatour®* database and further fields can be edited, such as Scheduling parameters.

8.15 Delete customer

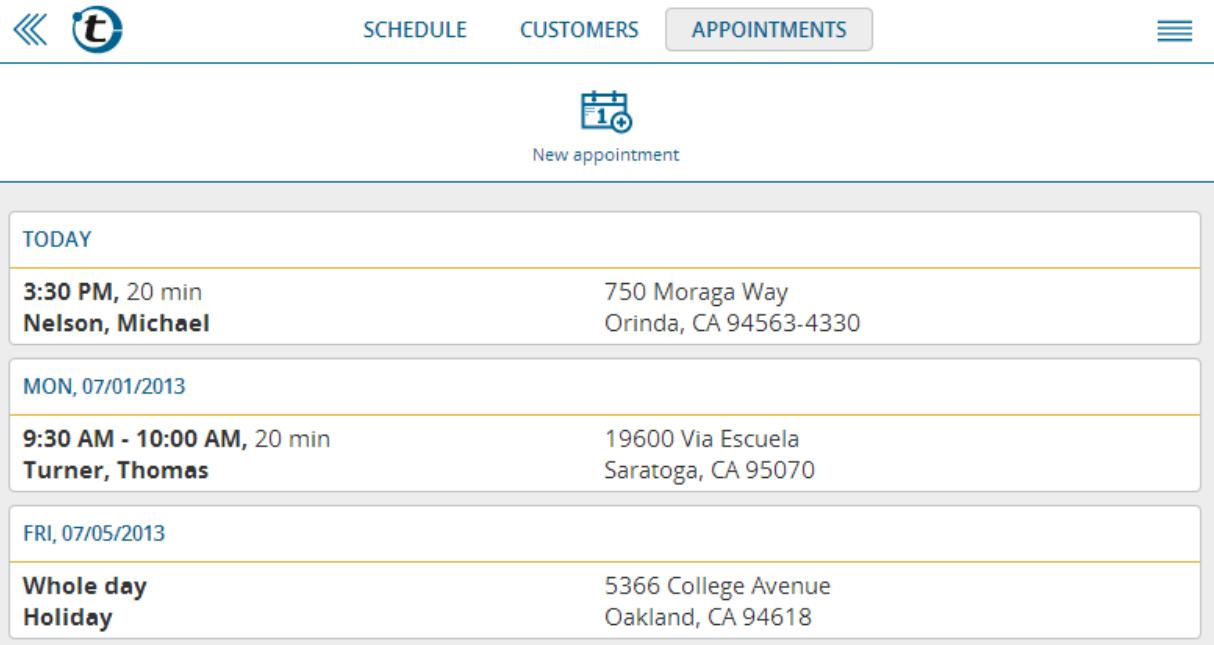
By clicking **Delete**, the customer will be deleted after a confirmation.

9. Appointments

portatour® provides you with an appointment calendar, where you can add all location based appointments during your business hours – e.g. fixed customer calls, business meetings, mechanic's garage. These appointments are included in the automatic route planning with the highest priority.

9.1 Appointment list

You can get to the appointment list by clicking the **Appointments** tab in the navigation bar or the navigation menu.



The screenshot shows the software interface for managing appointments. At the top, there is a navigation bar with icons for back, forward, and search, followed by tabs for SCHEDULE, CUSTOMERS, and APPOINTMENTS (which is highlighted). To the right of the tabs is a three-line menu icon. Below the navigation bar, there is a header section with a blue icon containing a white '1+' and the text 'New appointment'. The main area is divided into sections for different days:

- TODAY**: Shows an appointment for Nelson, Michael at 3:30 PM, 20 min, located at 750 Moraga Way, Orinda, CA 94563-4330.
- MON, 07/01/2013**: Shows an appointment for Turner, Thomas from 9:30 AM - 10:00 AM, 20 min, located at 19600 Via Escuela, Saratoga, CA 95070.
- FRI, 07/05/2013**: Shows an appointment for Whole day Holiday, located at 5366 College Avenue, Oakland, CA 94618.

Appointments are grouped by day and displayed with start time (possibly with time frame), appointment duration and subject. Appointments that have already been completed are check-marked. The detail page of the appointment is opened by clicking on the appointment.

In the multi-column display mode, the event address is displayed in the second column.

9.2 Appointment detail page

The appointment detail page shows appointments including all their details. You can get to this page from three places in *portatour®* – each by clicking on the appointment link:

- From the **Appointment** list
- From the customer detail page in the section **Upcoming appointments**
- From the **Schedule** if the appointment has already been scheduled

The screenshot shows the appointment details page. At the top, there are navigation icons for back, forward, and menu. Below that, tabs for SCHEDULE, CUSTOMERS, and APPOINTMENTS are visible, with APPOINTMENTS being the active tab. The main content area is organized into four columns:

- SUBJECT**: Shows "Turner, Thomas" with a "linked customer" icon.
- DATE / TIME**: Shows "Date: Mon, 07/01/2013", "Start time: Flexible on the day", and "Duration: 20 min".
- ADDRESS**: Shows the address "19600 Via Escuela, Saratoga, CA 95070" with a "Show map" icon and a "Navigation" icon.
- INFORMATION**: Shows a note "Offer bulk sales contract." and a "DELETE" button.

The subject – often the name of the customer – and appointment address can be found at the beginning of the page. The appointment address can be visualized by clicking on **Show map** and forwarded to the navigation program by clicking on **Navigation** – similar to the customer detail page (see section "Map" on page 60 and "Navigation" on page 61).

If the appointment is assigned to a customer, the customer detail page is opened by clicking on the **linked customer** link.

9.3 Appointment took place

Select dates as **Took place** after having completed the appointment. Through this, *portatour*® no longer needs to consider this appointment in future updates – which is particularly important if you have provided this appointment with much leeway. This is not necessary if appointments – as is usually the case – are fixed by a narrow leeway, because *portatour*® ignores appointments that happened in the past.

If you click **Took place**, the appointment will be logged as completed with the current time and day. It will be check-marked on the appointment list as well as in the schedule. If this appointment is assigned to a customer, the date of the last customer call will be updated. Optionally, you are prompted to create a call report.

9.4 Delete appointment

Click on **Delete** to irrevocably delete an appointment from *portatour*® Anywhere. A confirmation message will show. The delete function can be disabled depending on the configuration.

9.5 Edit appointment

To edit an appointment, open the appointment details page and click on the edit icon . All icons open the same window for editing.

EDIT APPOINTMENT

SUBJECT

Turner, Thomas

ADDRESS

19600 Via Escuela
Saratoga, CA 95070

DATE / TIME

Schedule: With leeway

Date: Mon, 07/01/2013

Start time: 09 : 30 AM

Leeway: 30 minutes

Duration: 20 minutes

INFORMATION

Offer bulk sales contract.

Note

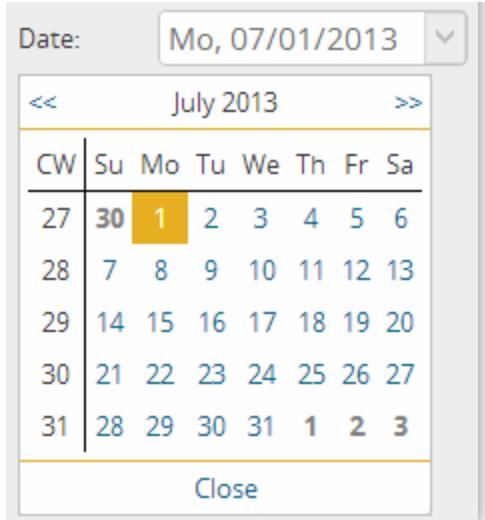
EDIT ADDRESS

REMOVE LOCATION

SAVE **CANCEL**

You can change the subject, date, and time settings. In the **schedule** drop-down menu, you can specify whether you want to give *portatour*® a leeway for flexibility and sales-route optimization purposes. You have the option between **On time**, **With leeway** and **Flexible on the day**. If the appointment is assigned to a customer, **With leeway** is set, and this customer has limited business hours on the appointment day, then the business hours will be considered as additional bounds.

The **Date** of the appointment is set in the drop-down menu. By clicking on **Calendar**, an additional calendar view to select the date appears:



You can change the month with the links << and >>. Click on the desired day to select a date – which will be highlighted in orange. **Close** the calendar view afterwards.

In the field **start time**, you set the beginning of the appointment. If the appointment is supposed to be scheduled **with leeway**, select the duration and the latest possible start from the **leeway** drop-down menu. Example: You have agreed that you will visit your customer in the morning. Set the start time at 08:00 and a 240 minute leeway. If you want to set a leeway for all new appointments by default, change the Business Rules section in the *portatour® Options* – see section "Appointment leeway" on page 92. The more leeway there is, the higher the potential for optimization through *portatour®*.

You can set the appointment **Duration** drop-down menu. If you cannot find your desired duration, select **Custom** at the bottom of the drop-down menu. Now, you can manually enter the appointment duration in minutes.

Duration:	20	▼	minutes
-----------	----	---	---------

If the duration of the appointment takes all day or multiple days, select the option **All-/Multiple Days** from **Schedule** and set the date and time of the appointment start and end. In this case, a leeway is not possible. In case of all day appointments, no further calls will be scheduled on this day by *portatour®*.

By clicking **Edit address**, the appointment address is displayed in the edit mode. Change the relevant address boxes and click **Geocode**. For details on address geo-coding and processing, see section "Geo-Location" on page 100.

If the appointment is not location bound – e.g. a telephone conference via mobile phone – click **Remove location**. This will enable *portatour®* to schedule the appointment at any location – usually on the way between two customer calls. The appointment thus serves as "time blocker" where no further calls can be made.

Optional data fields of the appointment are displayed in the **Information** section.

Press **Accept** to save your appointment changes.

9.6 Create appointment

9.6.1 Appointment with customer reference

If you enter an appointment with an existing customer, then look for the respective customer in *portatour*® – e.g. through customer search or alphabet index, open the detail page of the customer, and click **Create Appointment** in the **Upcoming appointments** section (see section "Upcoming appointments" on page 68). The details of this new appointment can be adjusted and then **Applied**, as described above. If the customer is included in the current schedule by *portatour*®, the new appointment will be initialized with the scheduled time.

Retrospectively creating or changing the customer reference of an existing appointment is not possible. In this case delete the old appointment and create a new one in the customer detail view of the right customer.

9.6.2 Appointment without customer reference

If the appointment is not related to a customer – for example a single appointment at the garage – select **Appointment** from the navigation bar or navigation menu and then **New Appointment**. You will see a menu where you specify the location reference of the appointment:

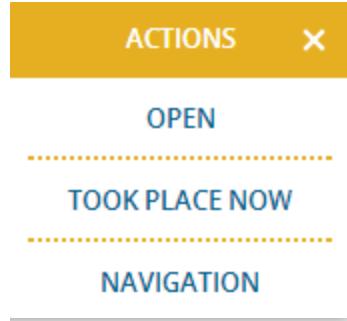


- **At Custom Address:** The address will be specified in the next window.
- **At Home:** The appointment will take place at home (e.g. vacation, public holiday or an early end of work).
- **Without Location:** The appointment is not bound to a location.

Subsequently, the window for creating the appointment is displayed. You can enter the subject of the appointment in the top line. The appointment address may need to be typed in manually or set on the map – see chapter "Geo-Location" on page 100.

9.7 Context menu for appointment list

Common actions for appointments can be accessed directly via the context menu for appointment list. On a desktop PC, you can open the context menu by clicking the appointment with the right mouse button, on devices with touch screen, tap on the appointment for about 1 second.



With **Open** you get to the detail page of the appointment (see section "Appointment detail page" on page 78).

Took Place Now highlights the appointment as having taken place ("Appointment took place" on page 79).

Navigation launches the navigation program of your device with the address of the selected appointment (see section "Appointment detail page" on page 78).

All actions are also accessible via the appointment detail page (section "Appointment detail page" on page 78).

10. My Places

In addition to customers, it is recommended to include important addresses, which are approached during working hours, and should therefore be included in sales-route planning, as contact. They can be of professional nature (e.g. corporate headquarters, product stock warehouse, garage, meeting places, preferred hotels, etc.) as well as of private nature (e.g. home location, second residence, school / kindergarten, etc.).

You can manage these important addresses through **My Places** in the navigation menu:

The screenshot shows the 'My Places' section of the navigation menu. At the top, there are icons for SCHEDULE, CUSTOMERS, and APPOINTMENTS, along with a search bar and a menu icon. Below this, there are two buttons: 'New place' (with a house icon) and 'Map' (with a map icon). The main area displays a list of locations:

Location	Status	Notes
Best Western Plus Garden Inn - Santa Rosa	m* new customer	First call due
Company HQ	m*	new customer First call due
Hallmark Inn - Davis	m*	new customer First call due
Home	m*	new customer First call due
Ramada Limited - Santa Clara	m*	new customer First call due

At the bottom of the list is a button labeled 'ENABLE SELECTION'.

To create a new place click **New place**. The process is analogous to customers (see section "Create customers" on page 75). To open a location click on the respective line. The detail view is displayed analogous to the customer. This view enables you to create an appointment at this location or to note this location for the sales-route, for example.

You can classify the address as location or customer with the edit icon in the **My Places** section of the detail view, using the function **Remove From "My Places"** or **Add To "My Places"**.



10.1 Preferred Accommodation

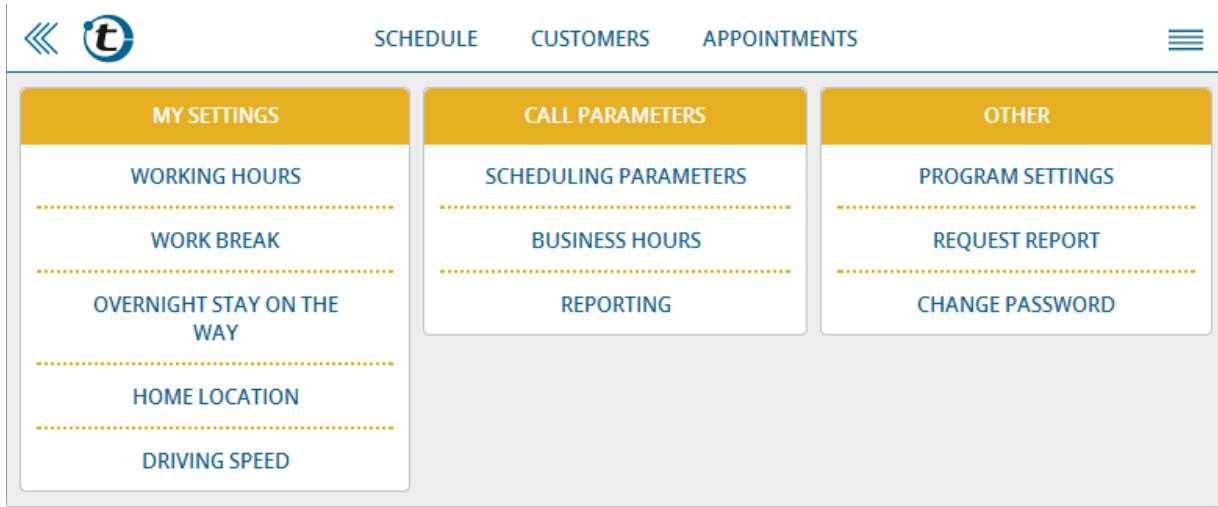
If you enable the option overnight stay on the way in *portatour*® – see section "Overnight stay on the way" on page 89 – a location or customer that is marked as **preferred accommodation** will be scheduled as preferred location for overnight stay at the end of the workday.

Therefore, include your favorite hotels or hotels with special rates as accommodation for overnight stays. The number of preferred accommodations is limited to 50. Therefore, only add accommodations that are actually in your sales territory.

Hint: If you only set **Mark as accommodation** and not **add to "My Places"** then this address is included as customer – where you simply enjoy staying over.

11. Options

In options, you can adapt *portatour®* to your personal needs and requirements. Click **Options** in the navigation menu to get to following menu:



11.1 Working hours

By clicking **working hours** and **custom settings**, you get to the editing page of working hours intended for customer calls.

X

ORGANIZATION DEFAULT					
CUSTOM SETTINGS					
Sunday: <input type="text"/> : <input type="text"/> <input type="text"/> - <input type="text"/> : <input type="text"/> Monday: <input type="text"/> 07 : <input type="text"/> 30 <input type="text"/> AM - <input type="text"/> 05 : <input type="text"/> 00 <input type="text"/> PM Tuesday: <input type="text"/> 07 : <input type="text"/> 30 <input type="text"/> AM - <input type="text"/> 05 : <input type="text"/> 00 <input type="text"/> PM Wednesday: <input type="text"/> 07 : <input type="text"/> 30 <input type="text"/> AM - <input type="text"/> 05 : <input type="text"/> 00 <input type="text"/> PM Thursday: <input type="text"/> 07 : <input type="text"/> 30 <input type="text"/> AM - <input type="text"/> 05 : <input type="text"/> 00 <input type="text"/> PM Friday: <input type="text"/> 07 : <input type="text"/> 30 <input type="text"/> AM - <input type="text"/> 05 : <input type="text"/> 00 <input type="text"/> PM Saturday: <input type="text"/> : <input type="text"/> <input type="text"/> - <input type="text"/> : <input type="text"/>					
SAVE			CANCEL		

Enter your desired departure and return time for each weekday. Set the times in the drop-down menu by selecting hours and minutes. On days off – e.g Saturday or Sunday – leave the fields blank. Quick deletion of a day is possible by selecting the first entry (empty) from the hour drop-down menu of the departure time.

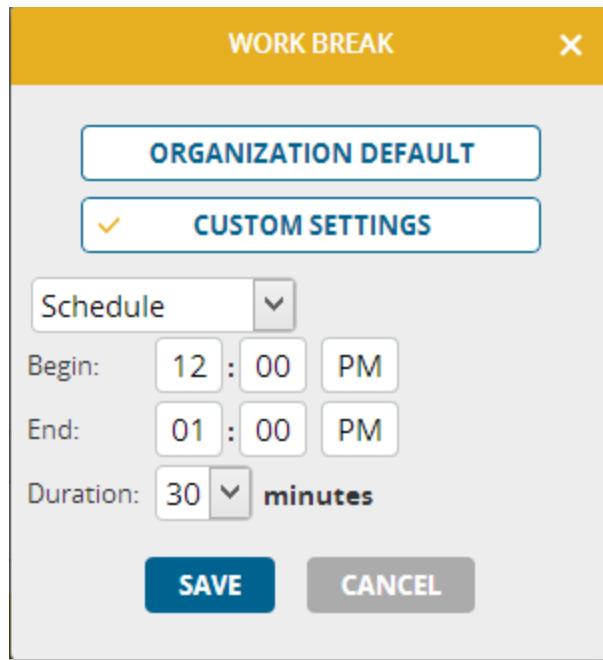
Press **Save** to change working hours.

For one-time deviations of working hours it is recommended to create appointments on that day. An appointment set outside working hours extends the working day. Set appointments at home to start the workday later or to go home early in the evening.

Organization default resets working hours to the default values of your organization.

11.2 Work break settings

By clicking **Work break** and then **custom settings** you get to the page where you can set your daily work break:

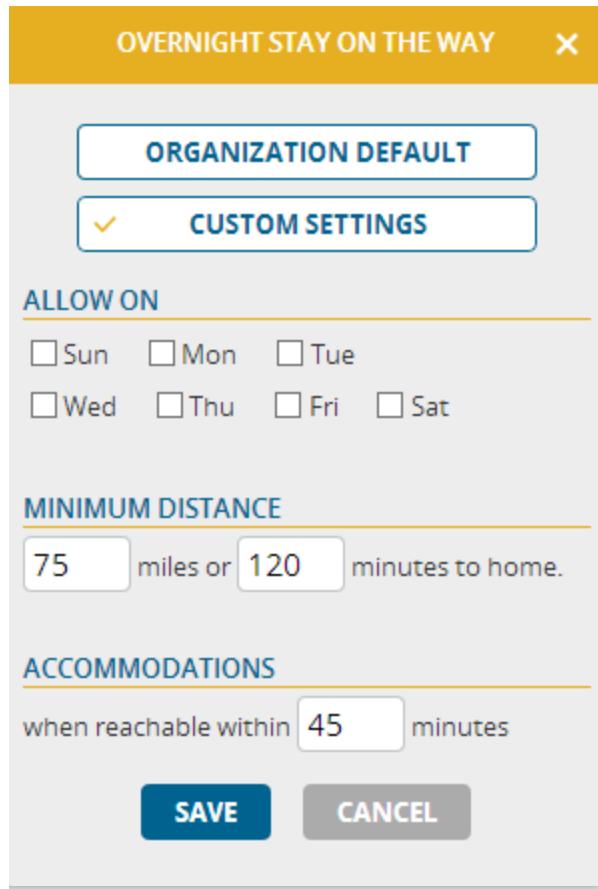


In the first drop-down menu, you can decide if you want to automatically schedule a daily work break (**Schedule**). With **Begin** and **End** you can set the time frame for the work break, i.e. earliest start and latest end. With the drop-down menu **Duration**, you can set the duration in minutes. The time frame has to be at least as long as the duration. A longer time frame provides *portatour®* with some leeway for optimized scheduling, which is especially needed when customer business hours are limited or call durations take long. If the work break should be scheduled exactly despite offering less optimization, set the duration to the length of the time frame.

The time settings will be ignored if you select **Don't schedule** from the first drop-down menu.

Press **Save** to save the new setting. **Organization default** resets work break settings to the default values in your organization.

11.3 Overnight stay on the way



In case you have a wider sales territory, you can save cost and time if you decide not to return home at some days, and stay overnight during the sales-route.

In **overnight stay on the way** you set **custom settings** defining which days of the week can be scheduled by *portatour*® for an overnight stay on the way. Additionally, you can set the minimum distance between home and the accommodation. *portatour*® only schedules an overnight stay on the way, if the drive back home at the end of the day is longer than the distance in Miles or the duration in Minutes.

Note that *portatour*® does not schedule a stay overnight simply because you allow it on certain weekdays. An overnight stay on the way must meet the minimum distance criteria above and also bring relevant benefits in terms of saving time, to be suggested by *portatour*®.

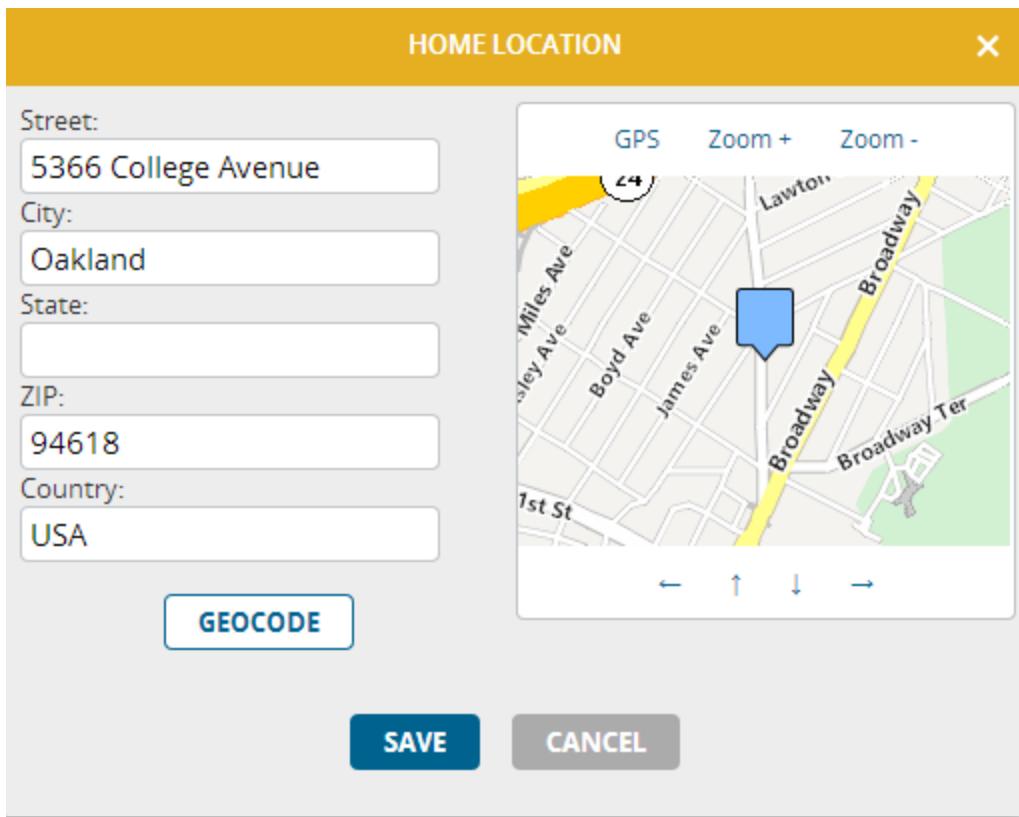
If you have preferred locations for overnight stays in your territory – e.g. favorite hotels or hotels with special rates – you can additionally specify within which maximum travel duration this preferred location for overnight stays should be selected. The management of these locations is explained in section "My Places" on page 84. If, after a customer call, *portatour*® does not find your preferred location for an overnight stay within the travel distance, the schedule ends at the last customer. The choice of a hotel nearby is yours.

Hint: If you want to stay overnight at a specific location – e.g. your favorite hotel – you can create an appointment at the end of the working day – e.g. 18-19 o'clock – with the exact accommodation address (see section "Create appointment" on page 82), which lasts until departure the next morning.

Organization default resets work break settings to the default values in your organization.

11.4 Home location

By clicking **Home location** you can edit the address you usually start and end your route with.

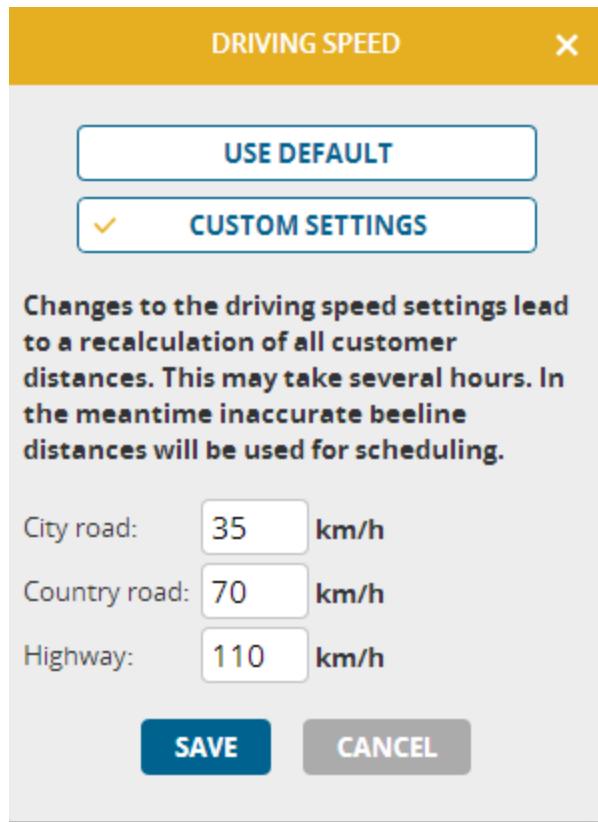


Enter the Country in order to avoid ambiguity. Customers without a configured country are assigned to your home country. After complete address entry, click **Geocode**. If Geocode does not deliver the desired result, you can manually alter the position on the map (see section "Set geo-location manually" on page 103) or determine the location by using the GPS function of your mobile phone (see section "Determine GPS location" on page 104).

Save your home location with **Save**.

11.5 Driving speed

portatour® uses a tested standard speed profile for sales-route scheduling, which largely corresponds to real driving times. In case you recognize during daily use of *portatour*®, that you regularly deviate from the scheduled journey time, you have the possibility to adapt the **driving speed** used in calculations. Adapt your speed on **City road**, **Country road**, and **Highway** to your driving style.

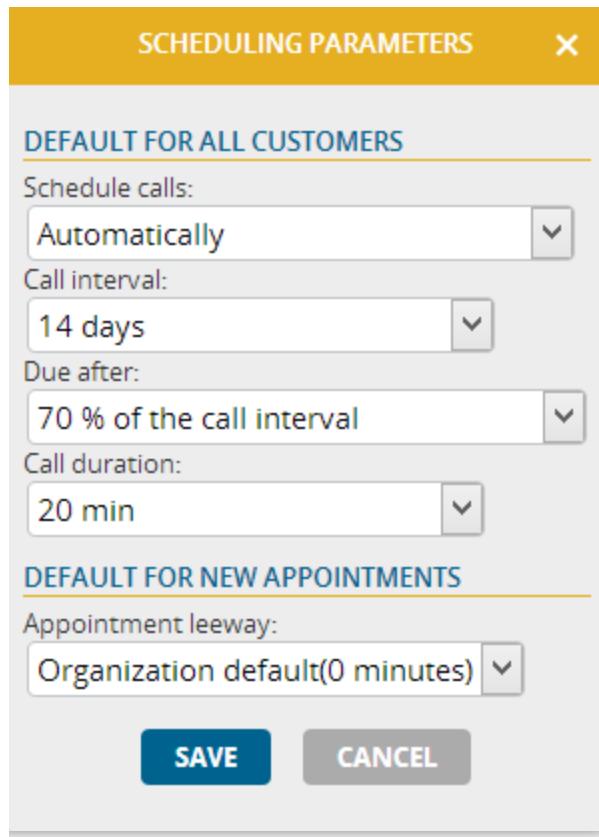


Please note that changes in driving speed lead to recalculation of travel durations among all customers, which could take several hours depending on server capacity and number of customers. In the meantime, approximate driving durations are calculated on the basis of beelines. Therefore, perform such changes thoughtfully.

Save the changed settings. **Use default** resets speed settings to the default values in your organization.

11.6 Scheduling parameters of customers

In the **Scheduling parameters** section, you can set the default which *portatour*® uses for sales-route scheduling if there are no individual settings for customers – see section "Scheduling parameters" on page 71. Set values that work as default for most of your customers. You can adopt the default values of your organization by selecting **Organization default** from the drop-down menu. Press **Save** to save your changes.



11.6.1 Urgency

In addition to scheduling parameters available on the customer detail page, there is the **Due after** setting. Enter the minimum duration of a call interval that must have elapsed to determine when *portatour*[®] can schedule the next call with this customer – i.e. when a customer is due for a call.

70% means, that a customer with a preferred call interval of 30 days will be taken into consideration by *portatour*[®] only 21 days after the last call at the earliest.

Select one of the percentages proposed or select **Custom...** to manually enter a number between 0% and 100%.

Remember that the lower the value, the greater the leeway for the next customer call, and the greater the scope for sales-route optimization by *portatour*[®].

11.6.2 Appointment leeway

In the **Appointment leeway** you can determine whether appointments in your *portatour*[®] calendar should be scheduled exactly according to the appointment time (zero leeway) by default, or whether you provide *portatour*[®] with an appointment leeway for the purpose of flexibility and sales-route optimization, e.g. 30 minutes leeway. To do so, select a given value from the drop-down menu or enter a duration in minutes by selecting **Custom...**.

Changing this setting only affects newly created appointments from this point onwards and can additionally be re-adjusted after each newly created appointment – see section "Edit appointment" on page 79. This setting does not impact appointments that have already been created.

11.7 Business Hours of customers

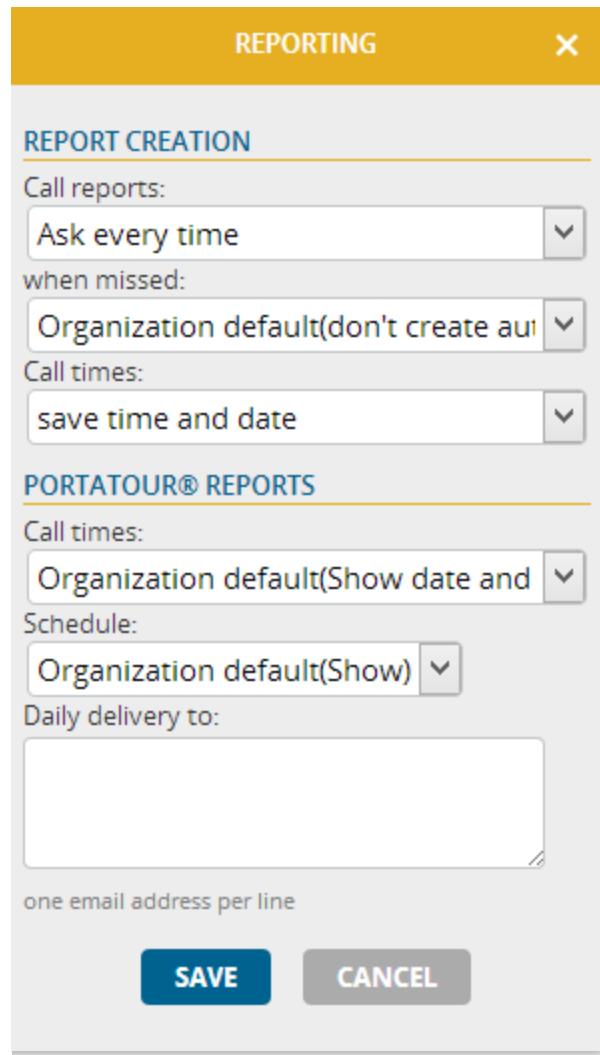
By clicking the option **Business hours** and **Custom settings**, you get to the default business hours of your customers. The times entered here are applied to all customers that do not have explicitly different business hours set on the customer detail page – see section "Business hours" on page 73. The processing is analogous.

The screenshot shows a configuration interface for business hours. At the top, there's a yellow header bar with the title "BUSINESS HOURS" and a close button "X". Below the header, there are two tabs: "ORGANIZATION DEFAULT" (which is selected, indicated by a blue border and a checkmark icon) and "CUSTOM SETTINGS". A horizontal line separates these tabs from the main content area. The content area is titled "DEFAULT FOR ALL CUSTOMERS". It contains two sections: "Sunday:" and "Monday:". Each section has a time range input field. The "Sunday:" field shows a range from 07:00 to 07:00, with "AM" in the middle. The "Monday:" field shows a range from 07:00 to 07:00, with "PM" in the middle. The input fields are composed of four boxes each, separated by colons and hyphens.

You can adopt the default values of your organization by clicking **Organization default**. Press **Save** at the bottom of the page to save your changes.

11.8 Reporting

By clicking **Reporting** you get to the site where you can automatically create call reports and determine whether call times are stored with date or with date and time:



11.8.1 Call reports

In the **Call reports** drop-down menu, you can select whether *portatour®* should automatically prompt you to create a call report when entering a customer call (click **called now**). You have the option between **don't create automatically**, **Ask every time** and **Create and open automatically**. Please note that in the *portatour®* Report (see section "portatour® Report" on page 108), calls are only shown and evaluated if they have previously been recorded by a call report.

11.8.2 Call Reports when missed

If you want to report unsuccessful call attempts in the *portatour®* report, where no contact has been encountered, select the option **Ask every time** or **Create and open automatically** from the drop-down menu **when missed**.

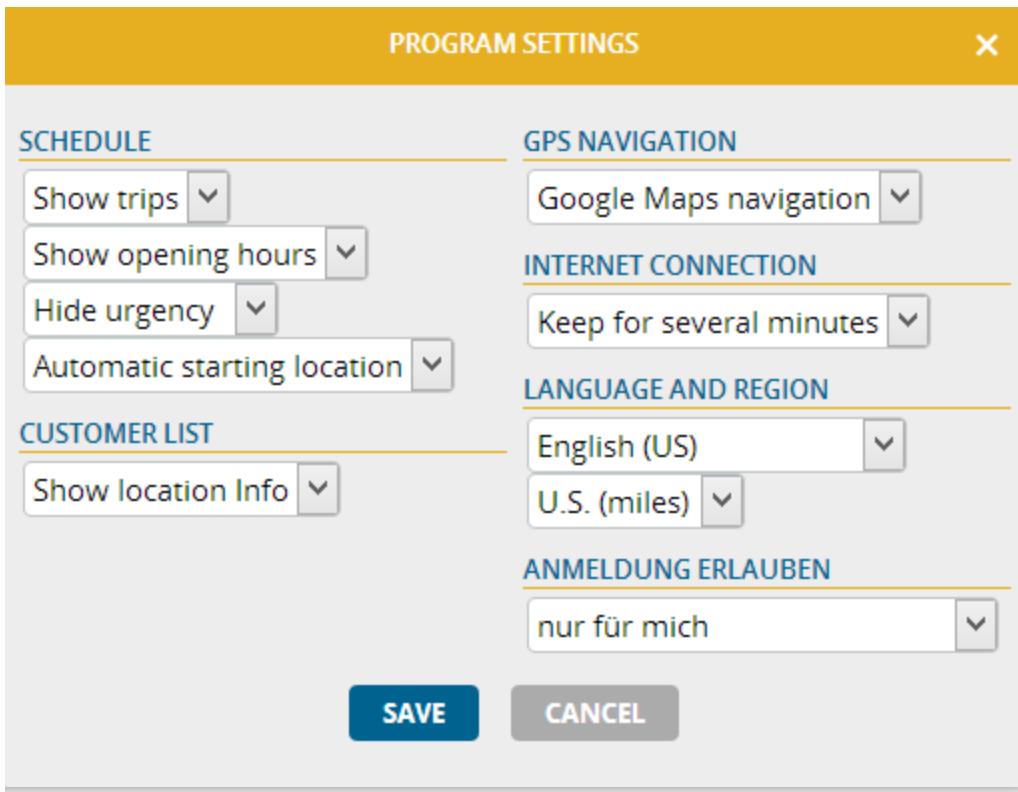
11.8.3 Call times

In the **Call times** drop-down menu, you can determine whether only the date should be saved or the time of the call as well. Please note that without providing the time, some statistics are not possible in the *portatour®* Report (see section "portatour® Report" on page 108).

Press **Save** to save your changes.

11.9 Program settings

By clicking **Program settings** you can personalize the display of data in *portatour*®:



11.9.1 Schedule

With **Show trips**, the drives are displayed by *portatour*® in the schedule including destination, distance and duration between stops. If you want to hide this line to save space, select **Hide trips**.

With **Show opening hours**, customer opening hours are displayed by *portatour*® in the schedule for the respective day, as long as they differ from default opening hours. If you want to hide this additional information, select **Hide opening hours**.

With **Show urgency**, *portatour*® highlights the due date for each customer call (=urgency) by an icon in the schedule. With **Hide urgency**, the icons disappear.

With **Automatic start location**, *portatour*® automatically changes the start location from **home** to **last customer** in the schedule, as soon as the first customer has been called on that day. For all other updates, the schedule is automatically calculated from the last customer called. If you do not want this automatism, select **Manual start location**.

11.9.2 Customer List

With **Show location Info** the postcode and the location of each customer are shown below each customer name on the customer list. If you recognize your customers by name and want to save space, select **Hide location Info**.

11.9.3 GPS Navigation

If your smartphone or tablet is equipped with a GPS receiver and a navigation program is installed, this is where you can activate the navigation function on the customer and appointment detail page. If you select **Automatic**, *portatour*® recognizes which smartphone you use and opens the navigation software installed (currently Apple Maps on iOS devices and Google Maps on Android devices). Hint: If your navigation program is not listed, select Google Maps from the drop-down menu – some programs work correctly when called like Google Maps. Note that navigation programs, which obtain map data from the internet, may need additional data volume and thus cause additional costs depending on your mobile operator. If you want to turn off the navigation function in *portatour*®, select **No Navigation**.

11.9.4 Internet connection

This setting is relevant if you use *portatour*® Anywhere on the road on your smartphone or tablet.

With the setting **Close immediately**, the connection to the internet will be disconnected a few seconds after loading the page, depending on the smartphone and network operator. Consequently, a new connection needs to be set up when loading the next page, hence delaying the loading process.

Select **Keep for several minutes** so that *portatour*® can retain the internet connection after loading a page and therefore accelerate loading future pages. If you stay on a page for a couple of minutes, the connection will still be cut off. Note that by keeping the internet connection active for a longer period of time, you increase battery consumption as well as data volume transferred. The additional data volume is typically around 10 MB per month when used every day.

11.9.5 Language and Region

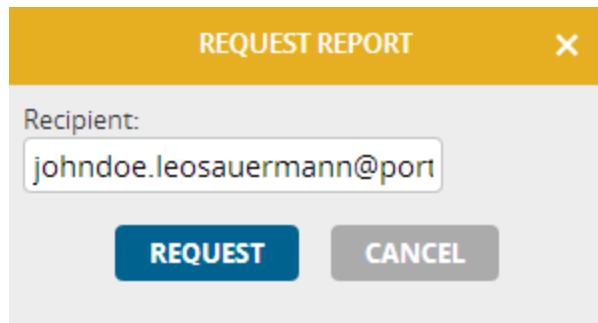
The language *portatour*® Anywhere is presented in, is shown here.

You can set the measurement system *portatour*® uses to display distances in the dropdown menu below. Select between **Metric (km)** and **U.S. (Miles)**.

11.10 Request report

portatour® compiles a report including your current schedule, a tabular summary of your customers based on call reports, and a statistical analysis of call related data from your sales territory. The report is delivered via email. For details on content and structure see "portatour® Report" on page 108.

portatour® Anywhere provides the option **Request Report**.

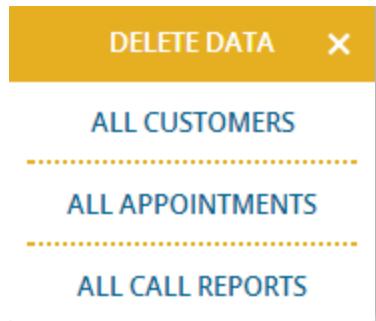


Your email address is automatically preset. Alternatively, you can manually enter a different recipient. Continue with **Request**. You will see a confirmation as soon as the server has forwarded the report. Please be patient - this may take several seconds to complete.

Note that the report cannot be displayed directly on *portatour® Anywhere*. If you have access to the email inbox of the recipient, you may open the report attached, however, the format is geared towards the screen of a tablet, notebook or a desktop PC.

11.11 Delete data

The option **Delete Data** enables you to delete all your customers, appointments and reports. Following selection appears:



select **All Customers**, **All Appointments** or **Alle Call Reports**, to delete the relevant data. The deletion process starts after a security confirmation.

Hint: Use this option if, for example, you have tested *portatour®* with test data and want to start operating with real data.

Hint: The deletion process is irreversible. You may want to export your customers prior to proceeding (see "Export customers" on page 54).

11.12 Change password

Change your password used for accessing *portatour® Anywhere* with the option **Change password**.

A screenshot of a mobile-style dialog box titled "CHANGE PASSWORD" with an "X" button in the top right corner. It contains three input fields: "Old password", "New password", and "Confirm password". Below the fields are two buttons: "SAVE" (in a blue box) and "CANCEL".

Provide your currently valid password in **Old password**. Select a new password, enter it in **New password** and confirm it in **Confirm password**. Press **Save** to apply the changes.

12. About portatour®

Click on **About** in the navigation menu. On this page you can find the legal information about *portatour*® and your user license.

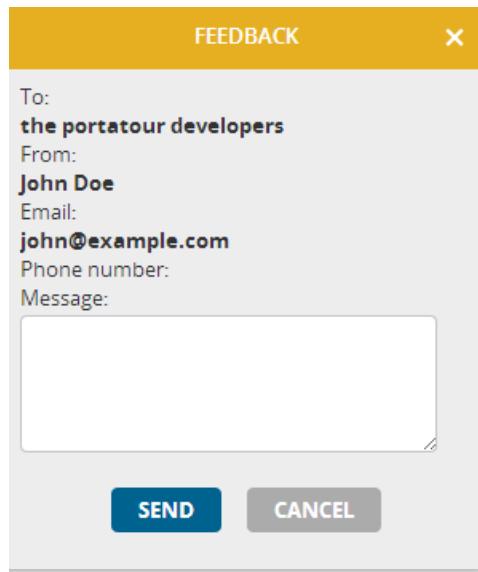
12.1 News

Open the menu item **About** and go to **News** to go to a site where regular *portatour*® updates are published, in particular software updates and new features.

12.2 Feedback

The *portatour*® Developer Team is looking forward to your feedback on *portatour*®: Are you missing an important function? Did you find any errors? Do you like anything in particular?

Click **About** in the navigation menu and then on **Feedback**. Following page appears:



Your contact details are preset and will be included to the feedback entered in the **Message** box in order to get in touch with you in case anything is unclear. Post the message with **Send**.

Alternatively you can send an informal email to feedback@portatour.net.

12.3 User Manual

The *portatour*® manual can be displayed or downloaded in PDF format. Open the menu item **About**, click on **Manual**. A new browser window will be opened.

13. Geo-Location

Accurate geo-locations are a requirement for appropriate inclusion of an address in the *portatour®* schedule. In the process of geo-coding, the address is checked and localized as accurately as possible on the map.

The addresses are automatically geo-coded when importing customer- and appointment data to *portatour®*. Depending on the quality of the addresses, there may be some problems with individual addresses.

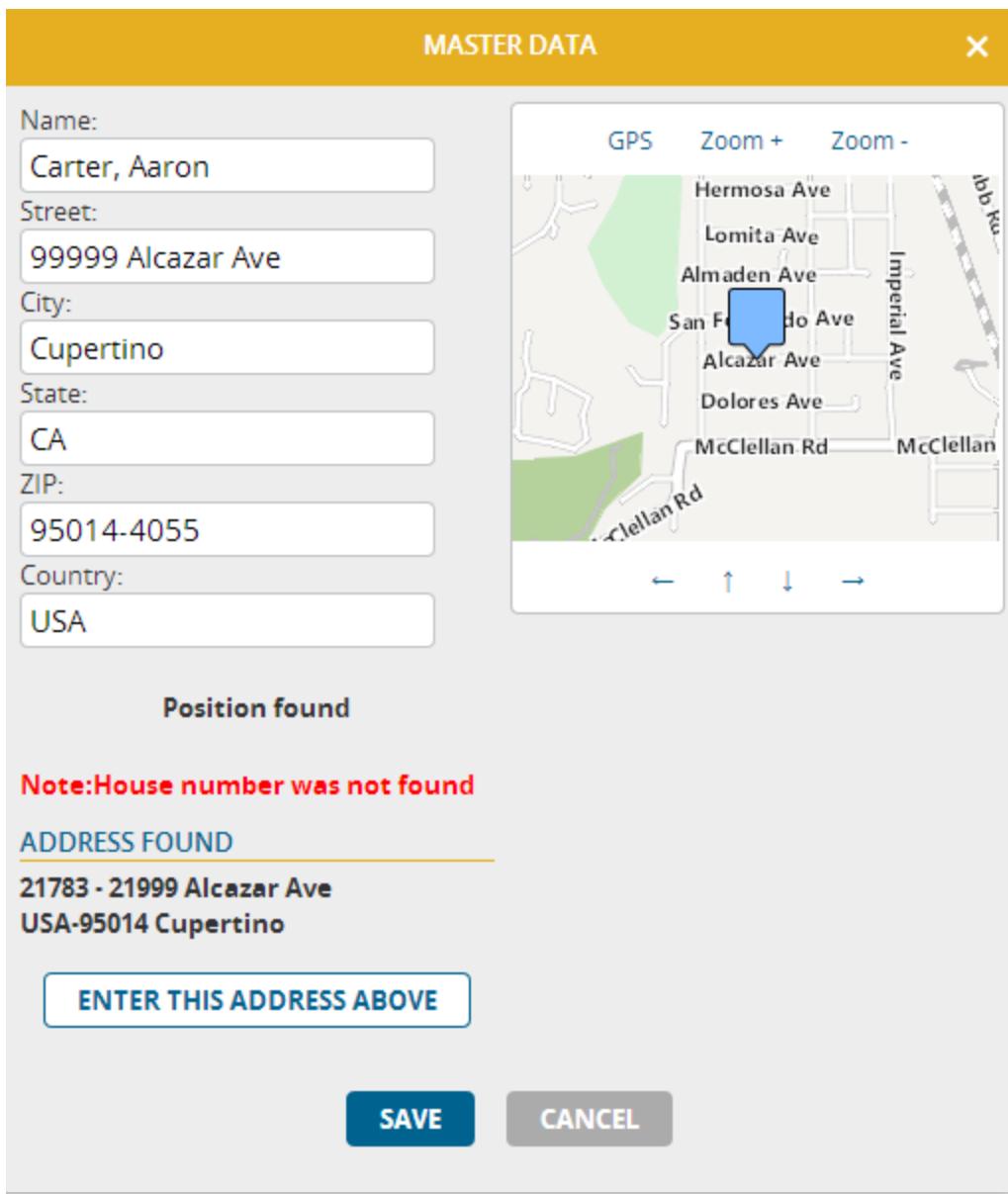
If you click **Geocoding** in the main menu you will receive a list of customers or appointments where geo-coding of the address has failed (section **Not geocoded**), or where geo-location was inaccurate (section **With Warning**). The amount of addresses in need of rework is shown in the navigation menu. At the bottom of the page, you can find a summary of successfully geo-coded customers and appointments.

The screenshot shows the portatour software interface with the following sections:

- NOT GEOCODED**: Contains one entry: **Broken-Baker, Dennis**, **Roaden Hag**.
- WITH WARNING**: Contains four entries:
 - Bennett, Susan**, **94957 Ross**
 - Broken-Carter, Sandra**, **94804 Richmond**
 - Brown, Ryan**, **94960 San Anselmo**
 - Clark, Jesse**, **94934 Hamilton Afb**
- SUCCESSFULLY GEOCODED**: Shows **243 customers** and **5 appointments**.

Customers or appointments should be edited immediately, as they cannot be scheduled by *portatour®* without geocoding. In such cases, the navigation menu and **Geocoding** menu item will be displayed in red. Inaccurate geo-positions are not critical. The quality of calculated schedules may only be affected in case of major deviations of the geo-location – for example, if the street name of a customer in a major city is missing.

To review, click on the relevant row. An input form is opened with the address *portatour®* used for geo-coding and displaying the customer on the map. Error or warning messages are shown in red:



Instructions on the messages and how to resolve warnings can be found in the section "Geo-coding" below.

If you do not know the exact address or if the geo-location accuracy is sufficient for sales-route planning, click **Save** on the bottom of the page.

13.1 Geo-coding

Geo-coding takes place in *portatour® Anywhere* ...

- when creating or editing customer addresses,
- when creating or editing appointment addresses,
- when manually entering a start location for the route,
- when setting your home location in Options.

The process of geo-coding is identical in all cases.

Enter the desired address into the **Street**, **City**, **ZIP**, **State** and **Country** fields on the form. Even if *portatour*® already accepts an address by merely ZIP or City, it is recommended to enter the address as accurately as possible in order to enable accurate geo-coding and thus optimal sales-route planning. The country field is only mandatory when setting your home location. Elsewhere, this field can be left blank if the address is in your home country.

Street:
21794 Alcazar Ave

City:
Santa Clara

State:
CA

ZIP:
95014

Country:
USA

GEOCODE

Geo-coding is launched with **Geocode**. The message **Position found** indicates successful geo-coding and the blue flag on the map indicates the found location.

MASTER DATA X

Name:
Carter, Aaron

Street:
21840 McClellan Rd

City:
Cupertino

State:
CA

ZIP:
95014

Country:
USA

Position found

GPS **Zoom +** **Zoom -**

Almaden Ave
San Fernando Ave
Alcazar Ave
Dolores Ave
McClellan Rd
Union Park
McClellan Rd
Park Villa Ct
Hyannisport Dr

← ↑ ↓ →

SAVE **CANCEL**

Accept the address including the position on the map with **Save**.

Under certain circumstances you may receive red warning- or error messages when geo-coding. This can have the following reasons for which there are suggested solutions:

13.1.1 Warning "Address was incomplete"

Check whether Street ZIP City State and country are provided complete the missing details and click again on the **Geocode** button.

13.1.2 Warning "House number was not found"

The house number entered could not be found on the map. A house number nearby will be selected automatically. In most cases, this level of accuracy is sufficient for sales-route planning. Alternatively, you can enter a different house number or manually locate the customer on the map (see section "Set geo-location manually" below).

13.1.3 Warning "House number was ignored"

The house number entered could not be located on the map, because there is no house number accuracy for the entered street. The midpoint of the road is used as position. Additionally, you can position the address of the customer manually on the map (see section "Set geo-location manually" below).

13.1.4 Warning "Citylevel accuracy"

The address entered was not found on the map, because it was either misspelled or there is no street information available for the location provided. The center of the city or general vicinity will be used as position. For bigger areas, it is recommended to manually adjust the customer address on the map (see section "Set geo-location manually" below).

13.1.5 Warning "Address had to be modified"

The address entered was slightly modified by *portatour*® to locate it on the map. In most cases, this situation results from different spellings of street or locality. This has no effect on the accuracy of geo-coding. However, check the suggested address. You can find it above the map.

13.1.6 Error "Address could not be geocoded"

The address entered is unknown. Please check again or conduct manual positioning on the map (see section "Set geo-location manually" below).

13.2 Set geo-location manually

If the automatic geo-coding does not deliver the desired result you can manually locate the customer on the map. Simply click on the desired location on the map.

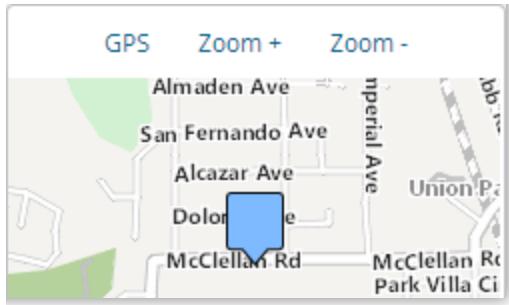
To facilitate locating the desired position on the map, adjust the map scale using the **Zoom** buttons above the map. You can move the map view by using the four **arrow** buttons in the respective direction. On mobile phones with touch screen, you can move the map by moving the finger or pen on the screen.

After selection, the blue marker will be moved to the desired location and the map will be centered accordingly. *portatour*® displays the used address above the map. Optionally, you can copy this

address into the address fields at customer, appointment, start location, home location ... by clicking **Enter this address above**.

Click on **Save** to save the manual geo-location and the new address.

13.3 Determine GPS location



If you want to use your current location as position and your mobile phone is equipped with a GPS receiver supported by *portatour®*, then click on the **GPS** button. Your position will be determined within a few seconds and displayed as address as well as a blue icon on the map.

Typically, this function is used when your current location is used as start location for scheduling (see section "Starting location" on page 37), as position of a customer you are currently at (see section "Edit address" on page 59) or if you want to set your home location (see section "Home location" on page 90).

After pressing the GPS button, you may see a confirmation message on your mobile phone. Agree to it to use the function in *portatour® Mobile*. If there is no **GPS** button above the map, your mobile phone model does not support this function.

13.4 Geo-coding warnings

There may be inaccurately geo-coded customer addresses upon automatic import. They can be found in a list under the **Geocoding** heading in the main menu.

**WITH WARNING****Bennett, Susan**

94957 Ross

Brown, Ryan

94960 San Anselmo

Clark, Jesse

94934 Hamilton Afb

Cooper, Derrick

94585 Suisun City

Díaz, Eric

94086 Sunnyvale

Gómez, Kenneth

94956 Point Reyes Station

Hernández, Larry

94560 Newark

Williams, Derek

94971 Tomales

SUCCESSFULLY GEOCODED

243 customers

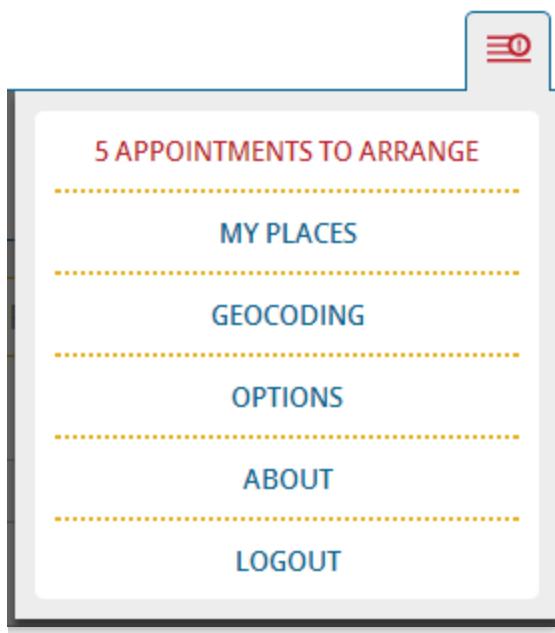
5 appointments

Edit these addresses to resolve the error, see section "Edit address" on page 59.

14. Reminders

portatour® includes all customers with the call scheduling parameter **Automatically** in automatic sales-route planning. Customers with the setting **Manually** need a manual reservation or the call needs to be entered manually to be included in the schedule. To help you remember these clients, *portatour®* automatically reminds you to schedule a call if they are due or overdue according to the call interval – within the business hours of the respective customers.

When reminders are present, the navigation menu is shown in red, and you can see the amount of calls to be scheduled in the navigation menu.



The detail view of these reminders is displayed by clicking the menu item **5 Appointments To Arrange**:

SCHEDULE APPOINTMENT X

[postpone](#)

Anderson, Kathryn 94553 Martinez Open:07:00-19:00	... 
Clark, Allison 94521-3799 Concord Open:07:00-19:00	... 
Ortiz, Melissa 94533 Fairfield Open:07:00-19:00	... 
Pérez, Tracy 94303 Palo Alto Open:07:00-19:00	... 
Murphy, Corey 95405-6934 Santa Rosa Open:07:00-19:00	... 

[SAVE](#) [CANCEL](#)

By clicking on one row, a detail view of a customer is opened, where you can create a reservation to include the customer in the schedule or create an appointment. Once you have done this, the reminder disappears automatically.

If, due to certain circumstances, you do not want to call a customer, despite being due according to call interval, you can temporarily disable reminders. You can select the earliest point in time, when you would like to be reminded next, from the drop-down menu next to the customer. You have the choice between **15 min., in 1 hour, tomorrow, in 1 week, in 1 month**. The settings will be stored automatically after you leave this page.

15. portatour® Report

The *portatour®* Report features a table of past calls, an evaluation of your call reports as well as statistical indicators showing relevant facts about your sales territory.

15.1 Request report

You can email the report to yourself anytime via **Navigation menu > Options > Request Report** – see section "Request report" on page 96.

15.2 Contents of the report

The *portatour®* Server considers your customers for the report, as well as your call settings and reported calls. Please note that only calls where call reports have been entered can be included (see section "Enter call report" on page 65).

If you want a report without exact times or do not want the schedule to be included, change the *portatour®* user settings (see section "Reporting" on page 93).

The *portatour®* report offers the following content:

15.2.1 Schedule

Schedule

Thu, 04-25	Fri, 04-26	Mon, 04-29	Tue, 04-30
<p><u>1.</u> 07:30 home 18 min Drive for 21.7 km to 1460 South Main Street, Walnut Creek, 94596-5319</p> <p><u>2.</u> 07:47 - 11:47 Call (Allen, Stacey) Appointment 16 min Drive for 7.2 km to 75 Santa Barbara Road, Pleasant Hill, CA 94523</p> <p><u>3.</u> 12:03 - 12:23 Reyes, Eric Walk to 77 Santa Barbara Road, Pleasant Hill, CA 94523-4201 30 min Workbreak</p> <p><u>4.</u> 12:53 - 13:13 Hughes, Gregory 18 min Drive for 9.4 km to 2900 Avon Avenue, Concord, CA 94520</p> <p><u>5.</u> 13:32 - 13:47 White, Brett 19 min Drive for 6.1 km to 222 Glacier Drive, Martinez, CA 94553</p> <p><u>6.</u> 14:05 - 14:25 Call (Miller, Derek) Appointment Walk to 204 Glacier Drive, Martinez, 94553</p> <p><u>7.</u> 14:25 - 14:50 Gray, Joshua 34 min Drive for 28.2 km to 2853 Groom Drive, Richmond, CA 94806</p> <p><u>8.</u> 15:24 - 16:24 Call (Cook, Lisa) Appointment 7 min Drive for 5.2 km to 5555 Giant Highway, Richmond, CA 94806-6002</p> <p><u>9.</u> 16:31 - 17:01 Baker, Dennis 10 min Drive for 8.1 km to 719 Fifth Street, Richmond, CA 94801</p> <p><u>10.</u> 17:12 - 17:37 Gómez, Emily keep 20 min Drive for 23.4 km to 5366 College Avenue, Oakland, 94618</p> <p><u>11.</u> 17:57 home</p> <p>109 km for 9 calls</p>			

Print all schedule days

The report includes the schedule that is current at the time of report creation. Each day is displayed on a separate tab. Clicking on the link next to the item's number opens a map view of the customer. If you want to print all days of the schedule, select the checkbox below. In this case, the individual days will be listed underneath each other.

15.2.2 Customer call reports

Customer call reports

Fri, 04-19						
Begin	End	Customer	City, postal code	Subject	Comment	
08:52	09:32	Perry, Russell	Fairfield, 94533	Call	Ordered	
09:40	10:20	López, Tracy	Fairfield, 94533-1615	Call	Invited to company event	
10:34	11:14	Jenkins, Robin	Vacaville, 95688	Call	Gave new catalogue, Gave sample	
12:32	13:12	Foster, Diana	Woodland, 95695	Call	Ordered	
13:24	14:04	Watson, Jerry	Woodland, 95776-6127	Call	Ordered	
14:15	14:55	Robinson, Shawn	Woodland, 95695-3154	Call	Gave new catalogue, Invited to company event	
15:02	15:42	Williams, Tiffany	Woodland, 95695-2510	Call	Invited to company event	
16:16	16:56	Martínez, Kenneth	Esparto, 95627	Call	Ordered	

Print all days

Call reports and reports manually entered in *portatour®* from within the past seven days are included in the report. The subsequent summaries and key performance indicators are based on this data. Your call notes are shown in the comment field.

Each day is displayed on a separate tab. If you want to print all days scheduled, click on the checkbox below. In this case, the individual days will be listed underneath each other.

15.2.3 Daily summary

Daily summary of last and current week

Day	Date	Calls	Begin	End	Excerpt of the route
Mon	2013-04-15	2	08:42	10:25	Richmond
Tue	2013-04-16	10	08:01	17:18	Sunnyvale - Cupertino - Saratoga - Hamilton Afb - San Jose
Wed	2013-04-17	9	08:30	17:24	Hayward - San Jose
Thu	2013-04-18	9	08:00	16:49	Orinda - Moraga - San Ramon - San Leandro - Oakland
Fri	2013-04-19	8	08:52	16:56	Fairfield - Vacaville - Woodland - Esparto
Last week		38			

The working days of the current and last week are listed. Begin- and End time correspond to the first and last reported customer call – not the departure and arrival time from or back home. The route is taken from the addresses of customers visited on that day.

15.2.4 My key figures of last 90 days

My key figures of last 90 days

Day	Workdays	Calls	Per day	Ø Begin	Ø End	Visit time	Ø Call
Mon	2	3	1.5	09:36	10:42	00:55	00:36
Tue	2	11	5.5	09:56	14:54	03:40	00:40
Wed	2	10	5.0	10:27	15:14	03:20	00:40
Thu	1	9	9.0	08:00	16:49	06:00	00:40
Fri	2	9	4.5	08:35	12:57	03:00	00:40
	9	42	4.7	09:27	13:49	03:05	00:39

42 called customers in the last 90 days. This is equivalent to 16% of all customer count.

The calls of the last 90 days are broken down by weekdays and analyzed accordingly. The footer corresponds to the sum or average of all weekdays. The actual number of workdays is calculated – i.e. days on which at least one call has taken place; the total number of completed calls; the average number of calls per workday; the average time of the first and last customer call; the sum of visit time; the average duration of a customer call.

15.2.5 Urgency

Urgency of my customers

Urgency	Customers	New customers	Count	Ratio
Not due	142	0	142	54.8%
Now due	87	0	87	33.6%
Overdue	30	0	30	11.6%
Sum	259	0	259	100.0%

Currently overdue customers

Customer	City, postal code	Days planned	Days current	Days target	Urgency	Information
Reed, Catherine	San Rafael, 94901	2013-02-13	71	30	237 %	
Young, Gregory	Healdsburg, 95448	2012-12-07	139	60	232 %	
Jenkins, Pamela	Napa, 94559	2012-10-03	204	90	227 %	Excluded
Miller, Derek	Martinez, 94553	2012-10-16	191	90	212 %	

The customers saved in *portatour*® are classified and counted according to call urgency. *portatour*® differentiates between customers who have been called at least once (where the date of the last call is known) and new customers, where this field is still empty.

The due date of customers is calculated by comparing the desired call interval in days and the actual days elapsed since the last call. For new customers, the activation date is taken instead.

There are three classes:

- **Not due:** The days elapsed since the last call, as a percentage of the call interval, is lower than the overdue percentage defined in Schedule settings (70% by default, see section "Urgency" on page 92).
- **Due now:** The number of days elapsed since the last call is already higher than the percentage entered in your Schedule settings (70% by default). If the time elapsed since the last call is exactly equal to the call interval provided, then urgency is precisely 100%.
- **Overdue:** The time elapsed since the last call is significantly higher than the call interval (due by ~130% or more).

To assist you when scheduling calls manually, *portatour*® gathers overdue customers in a separate list, where desired call interval (days target) as well as the number of days elapsed since last call (days current) are displayed. In case *portatour*® identifies a reason why the customer has not been scheduled automatically, the relevant information will be provided in the information-column to the right.

15.2.6 Classification per call interval

Classification of my customers per call interval

Call interval	Count	Ratio	Calls/a
None	17	6.6%	0
30 Days	35	13.5%	426
60 Days	102	39.4%	620
90 Days	105	40.5%	426
Sum	259	100.0%	1,472

Necessary calls per day to satisfy call interval: between 6.5 (=225 workdays/a) and 7.4 (=200 workdays/a)

The customers saved in *portatour*® are grouped and counted according to call interval. The number of calls per year is based on the call interval. It is summed up for all customers in the footer. This sum corresponds to the number of calls you have to complete within a year in order to meet the call intervals set for each customer. Below you will find the required calls per day as an orientation – depending on how many working days you have each year for calls.

Compare the target numbers with your empirical values or the actually performed calls per day of the past 90 days (see section "My key figures of last 90 days" on page 109). This way, you can easily identify whether your goals are achievable and make necessary adaptations where applicable.

15.2.7 Classification by call duration

Classification of my customers per call duration

Call duration	Count	Ratio
15 Minutes	57	22.0%
20 Minutes	124	47.9%
25 Minutes	38	14.7%
30 Minutes	40	15.4%
Sum	259	100.0%

Average call duration per customer: 21 min. Necessary call duration/a: 513 h.

The customers saved in *portatour®* are grouped and counted according to their call duration. Below, you can see the average call duration and the total duration you will spend at customers in one year.

15.2.8 Business hours

Business hours of my customers

Day	7h	8h	9h	10h	11h	12h	13h	14h	15h	16h	17h	18h	
Mon	206	206	220	220	220	217	217	217	217	217	195	195	242
Tue	223	223	223	223	223	228	228	228	228	228	181	181	245
Wed	212	212	212	212	212	217	217	216	216	216	194	194	234
Thu	222	222	222	222	222	227	227	227	227	227	180	180	244
Fri	206	206	220	220	220	242	242	228	228	228	181	181	242
	237	237	237	237	242	242	242	242	242	195	195	259	

You can read from the table how many customers are actually opened during a specific time of the respective weekday. The time is split by hours per columns – e.g. the column 9h shows the time between 09:00 to 09:59 am.

15.2.9 Classification per business hours per week

Classification of my customers per business hours per week

Business hours	Count	Ratio
None	0	0.0%
<= 1h	0	0.0%
<= 8h	0	0.0%
<= 16h	17	6.6%
<= 32h	0	0.0%
> 32h	242	93.4%
Sum	259	100.0%

The customers saved in *portatour®* are classified and counted according to weekly opening times. The shorter the customer's opening times per week are, the harder the optimal scheduling becomes, because customers with short opening times leave little scope for scheduling and are very decisive for the course of the route.

15.2.10 Area analysis

Distances and traveling times in my area

	Distance	Travel time
Ø from home location to customer	66.1 km	00:50
Ø between customers	5.3 km	00:09
Maximal working area extent	254.1 km	03:44

For the area analysis, distances and travel time are measured in your sales territory. The value **Ø from home location to customer** tells you on average how much time you need to get to your first customer each day or the time you need to return home in the evening. The specification **Ø between customers** can be regarded as minimum travel time between each of your customer calls. The **Maximal working area extent** corresponds to the distance and travel time between the two most distant customers in your area.

16. Frequently Asked Questions

16.1 Questions about scheduling

16.1.1 How can I set a shorter call interval than 7 days for a customer?

Automatic call intervals shorter than 1x per week are not supported in *portatour®*, because the scheduling leeway is too restricted.

Use appointments instead.

16.1.2 Why is a customer with 30 day interval already scheduled after 25 or only after 35 days?

Generally, call intervals are used as guidelines for *portatour®*, which deviates the effectual call intervals slightly in order to optimize routes and minimize driving distances. Very decentralized locations or heavily restricted business hours of a customer can all have an impact meeting the call interval. Furthermore, overall compliance to all call intervals depends on the number of customers and size of the territory. If you have too many customers and there is not enough time to keep up with the call interval you have set as a goal, *portatour®* will still try to meet the call intervals, but effectively the customers will be visited in a prolonged call interval. The ratio remains protected, e.g. a 30-day-customer is visited twice as often as a 60-day-customer. If on the other hand the number of customers is too low, *portatour®* will use the freed time to schedule more customers, visiting customers starting with the lower limit of call urgency (see section "Urgency" on page 92). This could lead to a 30-day-customer being visited every 25 days.

16.1.3 Why is my working schedule extended or my work break cancelled?

The compliance with appointments you have entered manually has a higher priority than complying with the configured working hours or work break. If you have an appointment early in the morning the start of the day will be scheduled early in order to arrive on-time. If you have an appointment in the evening the working schedule will be extended accordingly. If you have entered an appointment in the work break time frame the work break will be cancelled.

16.1.4 Why are my working hours not used to the full extent at the end of the day?

There could be two reasons. Basically, the end of working hours configured in *portatour®* is regarded as the latest return time home – with the exception of appointments

- In many cases it is not possible to schedule another customer at the end of the day and still return home in time. Therefore the working hours are often not fully utilized. You gain flexibility here by extending your end time of the work day a few minutes back (set this in the configuration). For example If you want to arrive home at 5:00 PM o'clock on average set your latest end of the day to 5:15 PM.
- In some cases, it may happen that an additional customer could only be called with disproportionately more travel time or the customer can be called with much less effort on one of the upcoming days. Therefore, *portatour®* decides to take an early end of the day.

16.1.5 Why does the schedule not begin now but in a few minutes, although I set schedule start to "Now"?

If a customer who should be called next has limited business hours, there may be a waiting time before driving off, because you would get there too early. Use this as a time buffer you have at your disposal – e.g. to drive slower or to prepare for meeting the customer.

16.1.6 Why is a scheduled customer call outside of his business hours?

During scheduling, *portatour*® automatically focusses solely on the call start being within the business hours provided. Exceeding business hours due to call duration is possible. You can help yourself by taking this into account when entering business hours – set the closing time earlier. Furthermore, manually scheduled events may be completely out of business hours.

16.1.7 Why does the travel time in the schedule not correspond to reality?

portatour® uses a tested default speed profile for route planning, which largely corresponds to reality. If you realize during daily use of *portatour*®, that you regularly lie outside of the scheduled journey times, you have the option to adapt the average speed used for calculation. Adapt the Driving speed settings for **city road**, **country road** and **highway** (part of the User settings), according to your driving style. Up-to-date traffic announcements are not yet considered by *portatour*® in this release.

16.1.8 Why do I get different schedules if I click on update twice in a row, without changing anything?

The calculation of an optimal schedule for several days with a large number of customers is mathematically a very complex operation, where billions of possibilities have to be considered. Even high-performance computers are not able to perform this task in foreseeable time, which means that optimized approximation methods have to be used. Through this, *portatour*® is able to find several very good schedules which are close to the optimum. Since there are several very good schedules, it cannot be guaranteed that the same is found and returned every time.

16.1.9 Why do I get a schedule with no or only few customers?

This can have several causes:

- You have not yet imported any customers into *portatour*®.
- All your customers are set to **manual planning**.
- No **business hours** are set for your customers.
- In the *portatour*® user settings your **working hours** are not entered or very limited.
- Scheduling took place shortly before the end of working hours. Thus, for the current day, it is no longer possible to complete at least one customer call including travel and returning home prior to the end of working hours.
- The Schedule Parameter planning mode is set to **only reservations and appointments**. But you have not included any customers or entered any appointments into the calendar for the next few days.
- All your customers are new customers (no **last call**) and the **activation date** is in the future.

- None of your customers is due for a call because all customers have been called recently. The call urgency barrier is described in **Options > Scheduling parameters**.
- Your home location is geo-coded incorrectly, so that your customers are too far away to be reached within the time scheduled.

16.1.10 How can I move customers in the schedule?

Manually moving a customer is not possible directly. If you want to call a customer on a specific date or within a specific time frame, create an appointment for this customer (see section) and update the schedule. If the customer had already been suggested in the schedule, the newly created appointment will be initialized with the scheduled time.

16.1.11 How can I set public holidays and vacation as work free days?

Enter a day off as an appointment in the Salesforce calendar e.g. in your home location for the whole work period (e.g. 7-19 o'clock) or as **All day Event**. The appointment may also extend over several days.

16.1.12 How can I accelerate the calculation of schedules?

- Ensure a fast internet connection (1 Mbit / s or more is recommended).
- Reduce the number of customers. Add only those customers to *portatour®* that you really intend to call.
- Check on the customer map (see section "Customer Map" on page 55), whether you have mistakenly enabled distant customers – e.g. in other countries.
- Do not unnecessarily calculate many days in advance. Recommended are 7 days.
- Set realistic values for customer call duration.
- If you intend to visit only customers included with a reservation or explicitly created appointments, adjust the planning mode of the Scheduling Parameters accordingly. Consequently, *portatour®* no longer tries to accommodate additional customers in the schedule

16.1.13 How can I schedule a period above 28 days?

Schedule the desired period in 4-week-steps. I.e. you schedule the first 4 weeks and transfer the suggestions to appointments in your calendar. To this by setting the **Fixed Date and time** of each call in the schedule and then clicking the button **Turn reservations to appointments**. Then, set Monday of the 5th week as the **departure time** in the planning parameters and perform another calculation. Repeat this process several times if necessary.

Bear in mind that during scheduling of the upcoming weeks, *portatour®* assumes the previous weeks ran according to schedule. This is generally a problem of long-term planning: unforeseen deviations during the work week make up the necessary rescheduling for the following week.

16.2 Questions on the software and using it

16.2.1 How do I log into *portatour®*, if I have forgotten username or password?

Click **forgot password** on the login page. Then, either enter your user name, your email address or your mobile number and click reset. You will receive a link with a security code via email and/or SMS.

Use this code to set up a new password. Your username will be shown on the next page.

16.2.2 Why does loading pages take so long?

The loading time depends mainly on the mobile phone model, connection speed, and signal quality. The loading time takes less than two seconds on average with either UMTS (3G) or HSPA (3G+) connection and normal signal quality. If your phone only supports GPRS or if you are in an area where only GPRS is available, the loading time increases to 2-6 seconds on average. In the Options, set Internet connection to Keep for several minutes to speed up loading (see section "Internet connection" on page 96). Furthermore, older or simple mobile phones may have speed problems with encrypted data transfer (SSL). It is possible to turn off the encryption by editing the *portatour*® web address replacing "https://" at the beginning by "http://". However, we do not recommend this, since your data will be transferred without encryption and can therefore be misused or read by third parties!

16.2.3 Why do I see the message "Loading..." without anything happening?

With weak mobile phone signal, it may happen that the data connection is lost and thus pages cannot be loaded. If a new page is not displayed after 30 seconds, click on the original link again, which will restart the transfer and possibly establish a new data connection. If this does not help, restart either the web browser on the mobile phone or the mobile phone itself. In the Options, set Internet connection to Keep for several minutes to speed up loading (see section "Internet connection" on page 96) – consequently reducing the probability of connections interruptions.

16.2.4 How can I set the correct time in *portatour*® Anywhere ?

portatour® automatically uses the time set on your mobile phone. However, some models have difficulties with transferring the daylight saving time and time zone. If the time in *portatour*® differs by whole hours, turn off summer time on your mobile phone, set the time zone to GMT ± 0:00, and then the phone time to the current time.

16.2.5 Can I be monitored by *portatour*® through the GPS function on my mobile phone?

No. Only you can make use of the GPS function on your mobile phone to determine your location for geo-coding (e.g. starting point of sales-route, home location). Remote retrieval of your location, recording journeys or the like are not supported by *portatour*®.

16.2.6 Do I lose *portatour*® data in case of loss or damage of my mobile phone?

No. All data of *portatour*® accessed through your mobile phone is immediately stored on the *portatour*® Server and transferred to Salesforce during the next synchronization.

16.2.7 Who do I contact if I have further questions?

Please get in touch with the contact person responsible for *portatour*® in your organization. If that person cannot answer your question, it will be forwarded to the manufacturer.

17. Legal information

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